

## Chapter 3

What is a firm permitted to do?

### 3.1 Permitted offers to customers

**3.1.1** **R** A *firm* is only permitted to offer to *customers*:

- (1) *view services*;
- (2) *data export* in accordance with **PDCOB 11**; and
- (3) *post-view services*.

**3.1.2** **G** While a *firm* must provide *view services* as part of *regulated pensions dashboard activity*, *data export* and *post-view services* are optional activities that a *firm* may choose to provide.