ROYAL LONDON

STRENGTHENING YOUR CONSOLIDATION CONVERSATIONS

We all know that having all your clients' pension plans in one place makes it easier to keep track of their retirement savings. Our Review Service has been designed to support the key stages of your ongoing client reviews, allowing you to spend more time on strengthening your client relationships and making sure your clients are fit for retirement.

HOW OUR REVIEW SERVICE WORKS

1 CREATE YOUR PROFILE

2 CHOOSE YOUR DATES

3 TAILOR YOUR OPTIONS

4 SELECT YOUR OUTPUTS

CONSOLIDATION THE FACTS

The benefits

- Keeping track of one pension plan for each client can be easier and clearer for both you and your client.
- Recommend a tailored investment solution for all of your client's retirement savings.
- Modern pension plans could offer lower charges than your client might get elsewhere.

The risks

- If your client is part of an employer's scheme they could lose out on employer contributions.
- If your client is in a Final Salary scheme it may not be in their best interests to transfer.
- Your client might have guarantees in their existing pension plan which would be lost if they transferred.

WHAT ELSE YOU CAN EXPECT FROM US

PEOPLE SUPPORTED BY AWARD-WINNING TECHNOLOGY

We offer a wide range of online tools and features designed to reduce the time you spend on day to day administration. So you can focus on adding value to your business.

SHARING OUR PROFITS

As a mutual, we believe our customers should share in our success. That's why we'll aim to give your clients a share of our profits each year. We call this **ProfitShare** and it's available exclusively from us.

5 STAR SERVICE

We retained our 5 Stars for Excellent Service at the Financial Adviser Life and Pensions Awards 2016, for the eighth year running. This is testament to the expertise of our staff and our commitment to doing all we can for you and your clients.

COMPLETE INVESTMENT SOLUTION

Our ready-made options benefit from regular reviews, hands-on supervision and ongoing governance at no extra cost. And for clients who prefer a more hands on approach, we have a well-stocked range of funds for them to choose from.

What next?

Speak to your usual Royal London Sales contact for more information and a demonstration of our Review Service.

18 61

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All literature about products that carry the Royal London brand is available in large print format on request to the Marketing Department at Royal London, 1 Thistle Street, Edinburgh EH2 1DG.
All of our printed products are produced on stock which is from FSC® certified forests.

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