



OUR RETIREMENT PLANNING SOLUTION – **TRANSCRIPT**

Since pension freedoms, your clients have more retirement options than ever before. At Royal London, we want to make it easier for you to find and recommend the right solution. That's why we've developed a range of retirement planning tools to help you discuss your client's options and define a working solution to meet their needs.

Our retirement planning tools will help you:

- Identify the income your client will need in retirement and present the different options available.
- Recommend an investment solution to suit their needs, both now and in the future.
- Understand the sustainability of their chosen income.

We'll also help you produce professional reports, that you can brand yourself, to explain your recommendation and educate your client about their income sustainability.

If income drawdown is the most suitable option, our new business consultants will set up your client's plan.

With a wealth of experience, you can trust them to get things moving quickly and efficiently.

You can also use our new business tracker to keep up to date with your new business pipeline, 24/7.

Once your client's plan is up and running, you'll want to review it on an ongoing basis to make sure their income continues to be sustainable.

You can use our drawdown governance service to provide a cost-effective review service.

Every quarter, you can view your clients' income sustainability score and understand the impact of any changes.

We'll provide professional report templates to help you talk to your clients on a regular basis. You can also store a copy for your records to show you're providing a compliant review service.

To find out more about how we can support you and your clients with the retirement planning journey, speak to your usual Royal London contact.



Royal London

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