For professional advisers only

NEW BUSINESS TRACKER – HOW TO USE OUR ONLINE TRACKER

With our new business online tracker you can access up to date information on your client's individual plans in real time.

HOW TO ACCESS THE NEW BUSINESS TRACKER

- Log into online service.
- Click on **Individual contracts** and then **New business tracker** – this will take you through to your own online tracker.
- If you're already in the new business area of online service click on the **Individual contracts tracking link**.

WHAT'S AVAILABLE ON THE NEW BUSINESS TRACKER

Overview

When you first go into the tracker, you'll see an overview of all the new business individual cases you've submitted to Royal London and the current status for each one.

We'll identify the status as:

Red – information is outstanding from the adviser
Amber – transfer payment is outstanding
Green – if a plan is currently being processed, if there is nothing outstanding or where a plan has completed.

If you want to have a more detailed look at an individual case, click on the specific plan and this will open a new window where you'll be able to see the following information. The individual cases will stay on the pipeline for three months.

Payment

The payment screen will show the regular and single contributions and transfer payments that are due on the plan.

Transfer details

We'll show the details of any transfer payments that we're either expecting or have received for the plan. We'll also show;

- when we last contacted the existing provider,
- any estimations they provided on when we can expect to receive the outstanding requirement, and
- we'll also tell you what date we'll next contact the provider for an update.

Outstanding information

This screen will show any outstanding requirements that we need before the plan can complete. Once we receive the outstanding information the system will automatically update.

Acknowledgement emails

This screen will provide links to the acknowledgement emails that we've sent about the plan.

Remuneration

The remuneration screen details any adviser charges that will be paid out on the plan, including the following;

- We'll provide information on the different remuneration available on regular and/or single contributions and transfer payments from each plan, and we'll also show what remuneration payments will be detailed in the next statement and the date they'll be paid.
- We'll show the remuneration details for any payments that we've recently made and this will match the remuneration details that appear on the remuneration statement.

INCOME RELEASE

If the client has chosen an Income Release plan, within this tab we'll detail all of the Income Release payments that we'll make to the client including:

- Details of any tax-free cash payments that are being paid including where the payments have been made to and how they were made.
- Details of any income payments that are being paid including, the amount that's been requested, the frequency they're being paid, who they're being paid to, how they're being paid and any additional details surrounding the Government Actuary Department (GAD) limits.
- Details about the Income Tap if the client has chosen to use this, including the level of income that's been requested, the frequency it will be paid and additional income that's available and the GAD limits.

Please note if your client has chosen not to go for an Income Release plan then you'll not see the Income Release tab on your tracker.

CONTACT US

Within this screen you'll be able to find out who your dedicated new business contact is and their contact details. You'll also be able to see the contact details for requesting new and existing business illustrations.

NEED HELP OR FURTHER INFORMATION?

- To register for our online service, visit **royallondon.com/onlineservice**
- Contact our Web Support team on **0845 60 50 401** or at **websupport@royallondon.com**

18 61

Royal London
1 Thistle Street, Edinburgh EH2 1DG
royallondon.com

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, St Andrew House, 1 Thistle Street, Edinburgh EH2 1DG.
All of our printed products are produced on stock which is from FSC® certified forests.

November 2014 65G0174/2