

# Review summary



Mrs A Sample

## Your Royal London pension plan review

Plan number: **1234567**

Review dates: **8 March 2021 to 8 June 2021**

**A Sample**

PCD Financial Planning

0123 456 7891

adviser@pcd.co.uk

pcd.co.uk

## Your retirement savings

Your plan started on **25 June 2008**.



The rates shown in the circle above are annual effective rates and are not adjusted for inflation.

## A breakdown of your plan value

Your current plan value of **£6,833.48** is made up of £6,463.63 (Income Release Account) and £369.85 (Savings Account). You currently have **£92.46** tax-free cash available in your plan.

## Contributions made in this review period

**£14.67** has been paid as a Profitshare award.

## Contributions made since your plan started

Since 25 June 2008, you've contributed £39,134.56 into your plan. You've also received £879.60 in extra money. That's a total of **£40,014.16** paid into your plan.

## Money you've withdrawn from your plan

In this review period you've withdrawn **£3,100.00** from your plan. Since your plan started, you've withdrawn £12,997.78.

Withdrawals from your plan	Tax free	Taxable	Total
In this review period (08/03/21 to 08/06/21)	£0.00	£3,100.00	£3,100.00
Since your plan started (25/06/08 to 08/06/21)	£9,897.78	£3,100.00	£12,997.78

## Planning ahead

You've already taken tax-free cash from your plan. When it comes to taking your remaining benefits, you'll find that your plan has a number of flexible options.

To help you plan ahead, I've looked at what some of these options might look like for you based on you taking an income 5 years from now. This assumes investment growth of 2.0% each year, and an assumed inflation rate of 2.0%. I've also factored in charges which will be taken.



This is just an example. It's not a full illustration of your retirement benefits but I can produce one for you.