

Retirement Health Check



		All OK	Needs attention	Urgent!
1.	Have you reviewed a forecast of your state and private Pension Benefits?	Yes	Don't know	No
2.	Are the levels of your pensions on target to achieve your retirement benefits when you are set to retire?	Yes	Don't know	No
3.	Have you contributed your maximum permitted pension contributions?	Yes	Don't know	No
4.	Have you performed a review of your returns on investments and savings?	Yes	Don't know	No
5.	Are your risk levels appropriate for the different investments you hold given your current age?	Yes	Time to review	Definitely not
6.	Are you happy with your pension/investment returns?	Entirely	Would like to review	Definitely not
7.	Have you considered alternative investment strategies to pensions?	Yes	Don't know	No

If you wish to discuss how we can help you maximise your retirement benefits or suggest alternative strategies please telephone to arrange an appointment on 01332 680540.

Action Points

		Completed
1.		
2.		
3.		
4.		
5.		

Celebrating 25 Years of Growth and Success

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