



Retirement Income Case Study...

IFA Client B contacted **Precision** Paraplanning for assistance with a retirement income case:-
The transfer of two personal pensions to an income drawdown plan.

What **Precision** Paraplanning did?

After requesting the initial fact find, case notes and access to the existing pension statements and existing pension annuity illustrations, we were able to provide within 5 working days;

- Assureweb open market Lifetime annuity research for comparison
- Selectapension income drawdown provider comparison research
- Defaqto research filter report for the preferred income drawdown solution
- Personalised illustrations, KIIDs and KFD for file
- A fully compliant Suitability Report in line with our clients preferred template, confirming all retirement options and risks of drawdown

What was the benefit?



Total adviser income = £3600 fee and 0.5% ongoing adviser charging

Total paid to Precision Paraplanning = £400
(a tax deductible business expense)

Total hours saved by the adviser = 8 hours *

* Time to spend generating additional business, meeting with clients and honouring existing service agreements

Take the first step towards a more profitable
business, contact us today

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Professional Outsourced Paraplanning Services