



Retirement Forecasting Questionnaire

Should you have any queries when completing this form please call us on **0845 074 7778**, we will be happy to help

1. Personal Details
Name:
Date of birth:
Email Address:
Telephone number:
Postal Address (this is mandatory for security purposes when obtaining information from your pension provider):
2. Retirement Ages – our report will show your potential pension income to the retirement ages you indicate below:
What is your anticipated retirement age?
Many people wish to plan to retire early, if you would like us to produce a forecast to a younger age than your anticipated age please tell us here:
3. Income – please indicate your target retirement income, in today's money, below:
4. To enable us to project your retirement income, we need to contact your existing pension providers, who will provide us with the information that we need to compile our report. We will only be requesting information and no changes will be made to your pension arrangements.
Please give details below of your existing pension arrangements. If you do not know the policy number or reference number, then please provide your National Insurance Number.
National Insurance Number:
Pension 1
Pension Provider / Employer:
Policy / Reference Number (if known):

