



Transferring your client's pension couldn't be easier

Prudential Flexible Retirement Plan

Prudential's Transfer Desk makes it easier for you to transfer your clients' pensions into our Flexible Retirement Plan. We have a streamlined process in place to secure transfer values and deal with the ceding provider – saving you time, money and effort.

Our Transfer Value Analysis System gives you clear information on the implications of transferring your clients' benefits, including the critical yield required to support the switch. Our Transfer Value Analysis System can be used to analyse DB to DC transfers giving you clear information on the implications of transferring your clients' benefits, including the critical yield required to support the switch. We aim to invest your clients' funds typically within 10 working days of receipt of the application form.

To request a quotation just call us on 0808 234 0808 between 8.30am and 6pm, Monday to Friday. Calls may be monitored or recorded for quality and security purposes. Alternatively, please e-mail sales@prudential.co.uk or contact your local Prudential Account Manager.

Please provide:

- a statement of the client's current scheme benefits, plus
- any other supporting documentation that we agree is relevant (e.g. member's booklet).

We will issue a Transfer Pack within 24 hours of receiving all the necessary information regarding your client's current scheme benefits.

Transfer Pack includes:

- Transfer Value Analysis Report (if requested)
- Quotation
- Application form
- Key Features

Post the completed application form and outstanding information required to: **Freepost, Prudential, Stirling, FK9 4UE** or submit online at www.pruadviser.co.uk

Once we have received the completed application form, we will send a letter **within three days** to the ceding pension provider to request the relevant documentation and transfer funds via Origo Options system where possible.



Transfer Desk updates your Prudential Account Manager when the application form has been received.

If the documentation and transfer funds aren't received by Prudential **within two weeks** of the request being made, and the transfer value is over £50,000*, we will make regular follow-up calls to the ceding pension provider to chase this up.



Transfer Desk keeps your Prudential Account Manager informed of any issues likely to cause delay and progress made.

As soon as our Transfer Desk has received the necessary documentation and the transfer funds we can set up the Prudential Flexible Retirement Plan.



Transfer Desk updates your Prudential Account Manager when the documentation and transfer funds have been received.

* We recognise the value of large cases to you so chase these up more frequently, updating your Prudential Account Manager on progress. For transfer values below £50,000 we will chase up the outstanding documentation and transfer funds within three weeks of the request being made.

How much time and money could our Transfer Desk save you?

Transferring a client's pension can often be a time-consuming process. Not only do Prudential take away the hassle and speed up the transfer process, but our dedicated Transfer Desk could also save you time – and time is money.

Some transfers are more complicated to arrange than others. However, we estimate that for a typical personal pension transfer case, advisers can spend on average six hours on administration that could be dealt with by our Transfer Desk, allowing you to spend more time on other new business. For example, as the flowchart on the previous page shows, we can help to gather all the necessary information from the ceding scheme, complete the gaps in the application form and obtain the transfer value.

For more information on Prudential's Flexible Retirement Plan just visit pruadviser.co.uk If you have any questions or queries, please call your Prudential Account Manager.



www.pruadviser.co.uk

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