

Retirement Wrappers Template

	Client
Name	
Sex	M / F
Date of Birth	__ / __ / ____

State Pension	£
Increase	%

Retirement Age	
Other non-savings income	£
Increase	%

Inflation	%
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Assets	Fund value	Growth Rate
Pension Fund / Single cont.	£	%
Annual pension contribution	£	
ISA Portfolio	£	%
Collective Portfolio	£	%
Onshore Investment Bond	£	%
Offshore Investment Bond	£	%

VESTING BENEFITS

Pension Benefits	Drawdown	UFPLS
Pension Vesting Age		
Fund to be crystallised	£	£
PCLS	£	
% of GAD income, or		%
Amount	£	

Step Up/Step Down?	Drawdown	UFPLS
At age		
Change?	Remain/Change	Remain/Change
Amount	£	£

Investments

Pre Retirement	ISA	Collective	Onshore	Offshore
Regular amount or Max	Amount / Max			
Regular Annual cont.	£	£		
Transfer to ISA each yr?		Yes /No		
Contribution increase	%			
Type of Units		Inc / Acc		
Income return		%		
Capital/Growth rate	%	%	%	%

Vesting Age				
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Benefits	ISA	Collective	Onshore	Offshore
Rebase?			Yes /No	Yes /No
Income	£	£	£	£
Increase/reduce p.a.	%	%	%	%

Step Up/Step Down?	ISA	Collective	Onshore	Offshore
At age				
Change?	Remain/Change	Remain/Change	Remain/Change	Remain/Change
Amount	£	£	£	£