

ASPECT

FINANCIAL SOLUTIONS
BESPOKE FINANCIAL ADVICE

Pension and Drawdown Review Questionnaire

Full Name:

Date:

1. Would you now like to take an income from your pension plan?

- Yes - please indicate either the percentage or amount per annum of the investment you are considering taking as an income, or alternatively the £ amount per annum you would like to take: _____
- No – if you have answered ‘no’ to this question, please move straight to question 6

2. To what extent would you like this to be guaranteed for the rest of your life?

- Yes, completely guaranteed
- Yes, partly guaranteed
- No, not guaranteed at all

3. Do you have any health or lifestyle conditions? (please answer the short medical questionnaire on page 2)

4. What is the minimum personal income that you need in retirement to meet your essential expenditure?
(Essential things vary by person, but could include food, electricity and gas bills)

- An income of £_____ per annum (please complete)
- I'm not sure, but I would like to discuss this with you

5. Are you worried about outliving your retirement savings? (Please select one option below)

- Yes, quite a lot
- A bit
- No, I'm not worried about it

[More questions to follow >](#)

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6. Are you happy to keep your money invested in a pension plan, and continue with the exposure to investment markets? (Please select one option below)

- Yes, I am happy to remain invested in a pension plan
- No, I want more security and no longer want to invest in a pension plan

7. Would you like to make any changes to your investments? (Please select one option below)

- No, I'm happy with my current investments
- Yes, I would like to make some changes to my investments

Thank you for your time in completing this short questionnaire. To enable me to help you review your requirements and options, in case there are any changes we need to make, please return it to me in the envelope provided.

Medical Questionnaire

Could get you more income in retirement? Answer these five health questions to find out.

If you answer yes to any of these questions it may mean that you qualify for an individually underwritten annuity rate – and that could mean a higher rate of income for you, that is guaranteed for life.

	YES	NO
Are you currently a regular daily smoker, or have you been in the last five years?		
Are you currently taking daily prescribed medication for a diagnosed medical condition?		
Have you ever received hospital treatment for a diagnosed medical condition?		
Does your height to weight ratio put you in the 'pale blue zone' (see height to weight table on the following page)		
Do you regularly drink alcohol on a weekly basis?		

Height to weightratio

Match your height with your weight in the table below. If the cell of the table is pale blue, you may qualify for an enhanced annuity.

		Height (feet/inches)																	
		4'6.5"	4'8"	4'9.5"	4'11"	5'0.5"	5'2"	5'4"	5'5.5"	5'7"	5'8.5"	5'10"	5'11.5"	6'1"	6'3"	6'4.5"	6'6"		
5st 9lbs																		36k	
6st 0lbs																		38kg	
6st 4lbs																		40kg	
6st 9lbs																		42kg	
6st 13lbs																		44kg	
7st 3lbs																		46kg	
7st 8lbs																		48kg	
7st 12lbs																		50kg	
8st 3lbs																		52kg	
8st 7lbs																		54kg	
8st 11lbs																		56kg	
9st 2lbs																		58kg	
9st 6lbs																		60kg	
9st 11lbs																		62kg	
10st 1lbs																		64kg	
10st 6lbs																		66kg	
10st 10lbs																		68kg	
11st 0lbs																		70kg	
11st 5lbs																		72kg	
11st 9lbs																		74kg	
12st 0lbs																		76kg	
12st 4lbs																		78kg	
12st 8lbs																		80kg	
12st 13lbs																		82kg	
13st 3lbs																		84kg	
13st 8lbs																		86kg	
13st 12lbs																		88kg	
14st 2lbs																		90kg	
14st 7lbs																		92kg	
14st 11lbs																		94kg	
15st 2lbs																		96kg	
15st 6lbs																		98kg	
15st 10lbs																		100kg	
16st 1lbs																		102kg	
16st 5lbs																		104kg	
16st 10lbs																		106kg	
17st 0lbs																		108kg	
17st 5lbs																		110kg	
17st 9lbs																		112kg	
17st 13lbs																		114kg	
18st 4lbs																		116kg	
18st 8lbs																		118kg	
18st 13lbs																		120kg	
19st 3lbs																		122kg	
19st 7lbs																		124kg	
19st 12lbs																		126kg	
20st 2lbs																		128kg	
20st 6lbs																		130kg	
20st 10lbs																		132kg	
		138cm	142cm	146cm	150cm	154cm	158cm	162cm	166cm	170cm	174cm	178cm	182cm	186cm	190cm	194cm	198cm		

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Signed:

Please complete and return this form to:

Aspect Financial Solutions Ltd, Courthill House, 60 Water Lane, Wilmslow, Cheshire, SK9 5AJ.

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