


LV=RetirementWizard*

Online Advice Documentation Checklist

To help us to understand your circumstances, and help you get the most from your pension pot, we have detailed everything you will need to have handy when you come to use the LV=Retirement Wizard online advice service or if you choose to speak to one of our professional qualified retirement specialists.

If you're within three months of wanting to access your pension and have combined pension pots of over £15,000 and up to £150,000, the LV=Retirement Wizard can help you get more from your pension savings.

Item	Explanation	Completed 
Personal information	<p>We use this section to establish a few basic details about you, such as your date of birth and whether you have a partner and any financial dependants. We also use this section to establish factors about your lifestyle and health that may entitle you to higher income from your pension pots. If you have a partner then we will also ask for further details about them. Things that may help you:</p> <ul style="list-style-type: none"> ■ Your personal details ■ The names of any medications you, your partner / any financial dependants take ■ Knowing about your partner's health 	<input type="checkbox"/>
Pensions	<p>We will need details of:</p> <ul style="list-style-type: none"> ■ Your current pension provider details ■ Your latest annual pension statements ■ The value of your pension savings 	<input type="checkbox"/>
Details of your income and expenditure	<p>We will need a breakdown of your income and expenditure currently, and what you will expect them to be during your retirement. Things that may help you:</p> <ul style="list-style-type: none"> ■ Your latest bank statement ■ Any future income information you have 	<input type="checkbox"/>

Liverpool Victoria Financial Advice Services Limited: County Gates, Bournemouth, BH1 2NF.

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