



Pension Performance Review®

Pension Performance Review Scorecard

To help you clearly understand your current pension situation, try The Pension Performance Review Scorecard. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column. Speak to one of our advisers to understand the significance of your score.

		1	2	3	4	5	6	7	8	9	10		
A	I have no idea what pensions I have, which companies they are with and how much they are worth	1	2	3	4	5	6	7	8	9	10	I know exactly what pensions I have, which companies they are with and how much they are worth at all times	A
B	My pensions seemed to be set up with little regard for my requirements and were not really explained to me when I took them out	1	2	3	4	5	6	7	8	9	10	My pensions were set up for my precise requirements and were explained fully when I took them out	B
C	I never have any idea how my pension investments are performing	1	2	3	4	5	6	7	8	9	10	I know exactly how my pension investments are performing at all times	C
D	I am often worried about how my pension investments are performing - I think they are generally performing very poorly	1	2	3	4	5	6	7	8	9	10	I never have any concerns about how my pension investments are performing - they are performing very well	D
E	I have no idea how much investment risk I am taking with pension investments and worry that they may be unsuitable for my needs	1	2	3	4	5	6	7	8	9	10	I am confident that I am taking enough risks with my pension investment strategy to obtain good returns but not more risk than I am comfortable with	E
F	I never have my pension investments reviewed by anyone and don't know if my investment strategy is on track	1	2	3	4	5	6	7	8	9	10	I have my pension investments regularly reviewed by investment professionals who keep my investment strategy on track	F
G	I am not at all confident that my pensions are suitable for my needs and would be very unlikely to contribute further to them even if I felt I should do	1	2	3	4	5	6	7	8	9	10	I am confident that my pensions are suitable for my needs and wouldn't hesitate to contribute more to them if I felt I needed and could afford to	G
H	I feel completely in the dark about how pensions operate, how they can be effectively utilised and the range of ways I can take an income in retirement	1	2	3	4	5	6	7	8	9	10	I completely understand how pensions operate, how they can be effectively utilised and the range of ways I can take an income in retirement	H
I	I think that my pensions may offer a pretty poor range of investment funds to invest in, but I don't think my pension provider likes to shout about it	1	2	3	4	5	6	7	8	9	10	I am sure that my pensions offer me a range of quality investment funds to invest in, run by top quality specialist fund managers with a proven track record	I
J	I have no idea what income I require in retirement and often worry that I don't know what income I may get from my pension and whether I could live on this	1	2	3	4	5	6	7	8	9	10	I know exactly what income I require in retirement, that my pension is on track to provide this and can sleep easily at night knowing this	J
ADD COLUMN TOTALS												YOUR SCORE: _____	