



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: _____	