



Pension Performance Review®

Comparison With Other Pension Transfer Systems

	Pension Performance Review Process	O&M Pensions Profiler	Selectapension
Full pension transfer suitability report generation	✓	✗	✗
Inbuilt risk profiling tool	✓	✗	✗
Critical yield and projection analysis	✓	✓	✓
Pension priorities analysis	✓	✗	✗
Tax free cash (PCLS) protection analysis	✓	✗	✗
Death benefits comparison	✓	✓	✓
Provider financial security comparison	✓	✗	✗
Fund performance comparison	✓	✓	✓
With profits analysis	✓	✓	✓
Asset allocation analysis	✓	✗ ¹	✗
Market value reducer analysis	✓	✗ ²	✗
Guaranteed annuity rate analysis	✓	✗ ³	✗
Waiver of premium (PCI) analysis	✓	✗ ⁴	✗
Life insurance analysis	✓	✗	✗
Policy charges comparison	✓	✓	✓
Investment flexibility comparison	✓	✗	✗
Guaranteed minimum pension analysis	✓	✗	✗
Pension shortfall analysis	✓	✗	✗
Retirement benefit options comparison	✓	✗	✗
Model portfolio system	✓	✓	✓
Portfolio monitoring and reporting system	✓	✗	✗
User definable remuneration	✓	✓	✓
Live fund data feed	✗	✓	✓
Inbuilt critical yield calculations	✗	✓	✓
Can transfer to most major UK pension providers	✗	✓	✓
Fully editable output reports	✓	✗	✗
Fully branded client reports	✓	✗	✓ ⁵
Fully integrated pension transfer system	✓	✗	✗
Highly compatible with wrap recommendations	✓	✗	✗
Covers all aspects within by the FSA thematic review	✓	✗	✗
Dedicated training course available	✓	✗	✗
Full telephone support available	✓	✓	✓

1. Fund specific asset allocation available but no consolidated asset allocation information. 2. Generic MVR information available only, according to with profits fund invested in. 3. Standard text can be inserted but no detailed policy specific GAR entry. 4. Standard text can be inserted but no detailed policy specific PCI (WOP) entry. 5. Additional setup charge for this functionality. All information correct at time of print.