



Pension Performance Review®

Pension Performance Review: The Complete Process

One of the problems with the old pension transfer model is that advisers must use a number of different systems to complete a pension transfer. Using multiple systems can be time consuming and may lead to problems and inconsistencies where systems meet. Compounding this, the use of multiple systems may lead to incomplete, incoherent or unprofessional client reporting.

Advisers using the Pension Performance Review Process enjoy a complete end-to-end pension transfer system allowing them to utilise a single, time-efficient, repeatable and scalable process for maximum effectiveness. Furthermore, it helps advisers process business quickly and simply, providing their clients with a comprehensive, high quality and consistent service.

