

Your Pensions MOT



Pass - "I feel confident that I'm in control of my pension"

Advisory - "I'm nearly there but still need some guidance"

Needs attention - "I need a helping hand to get me back on track"

	Pass	Advisory	Needs attention
1. I know how much I need to save <ul style="list-style-type: none">Do you know what you need / what you might get?Have you considered other long-term savings and any past pensions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I'm making the most of my pension <ul style="list-style-type: none">Are you contributing enough to achieve the retirement you want?Can you save more now (for later)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I'm comfortable with where I'm invested <ul style="list-style-type: none">If you've chosen your own funds, are you checking in regularly?If you've left it to the Trustees, does your target retirement date match your plans to retire?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I'm keeping track of my other pensions <ul style="list-style-type: none">Do you have multiple pots from multiple employers?Do you know how much is in each pension account?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I have an idea of what my retirement looks like <ul style="list-style-type: none">How much money do you think you'll need?Have you used a retirement calculator?Have you visited the Retirement Living Standards website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I understand my options at retirement <ul style="list-style-type: none">Do you know the difference between an annuity (guaranteed income) and drawdown (flexible income)?Do you know about how you can take cash from your Atlas Master Trust account at retirement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I keep up to date with my pension <ul style="list-style-type: none">Is your personal information, like your email, address, phone number and beneficiary(ies) up to date?Have you opened your latest annual update?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I've used tools and resources to get help <ul style="list-style-type: none">Have you visited MoneyHelper, used the online tools, and/or asked us to help?Have you taken steps to see what difference you can make to your future?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>