

## Annual Review Pack - Product Outline

The Annual Review Pack Module enables Administrators to generate a comprehensive review pack for a single or found set of members. For example, packs can be run for all members with a renewal date of a particular month at the click of one button.

The pack includes everything required to satisfy HMRC, FSA and DWP regulations governing information that must be provided to members at least once every twelve months, with the exception of an illustration for members in drawdown.

The pack includes the following:

- Summary of personal details;
- Breakdown of crystallised and uncrystallised funds;
- Schedule of contributions and transfers received;
- Pension Input Period statement;
- Valuation of assets ;
- Bank transaction report;
- Income withdrawal statement for each plan;
- Lifetime Allowance Statement;
- Benefit Statement;
- Income and Expenditure Summary;
- Summary of death benefits;
- Statutory Money Purchase Illustration for members with wholly or partially uncrystallised funds.

Individual sections of the pack can be suppressed at the request of the user. The user also has the ability to customise the text within some sections of the pack.

The pack has an accompanying letter, which can be customised to suit the user's requirements.