PENSIONHELP

HOW TO REFER A CLIENT

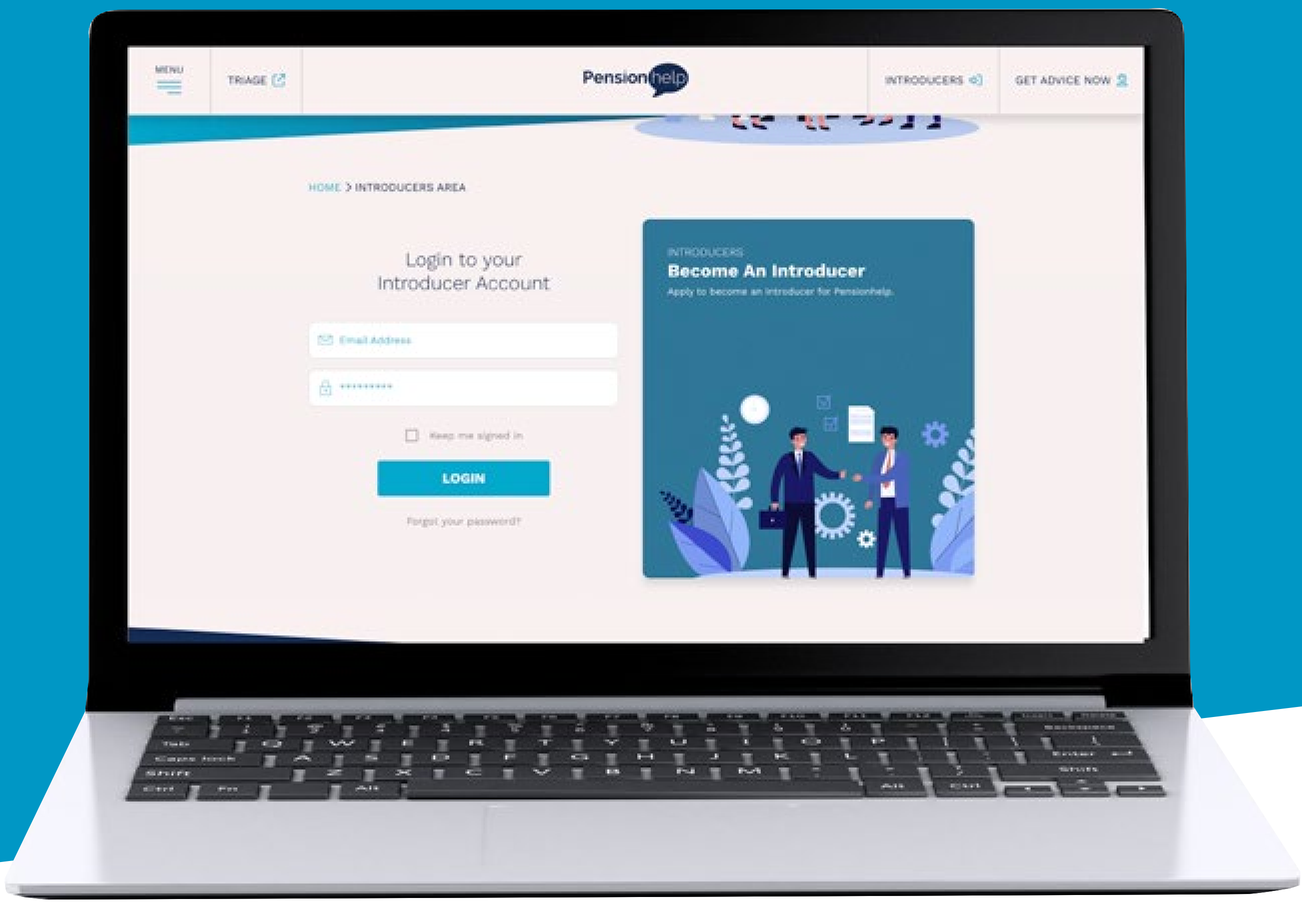
Pensionhelp

Step by Step Guide

V1 April 25

Client Referral
step by step guide

Step One



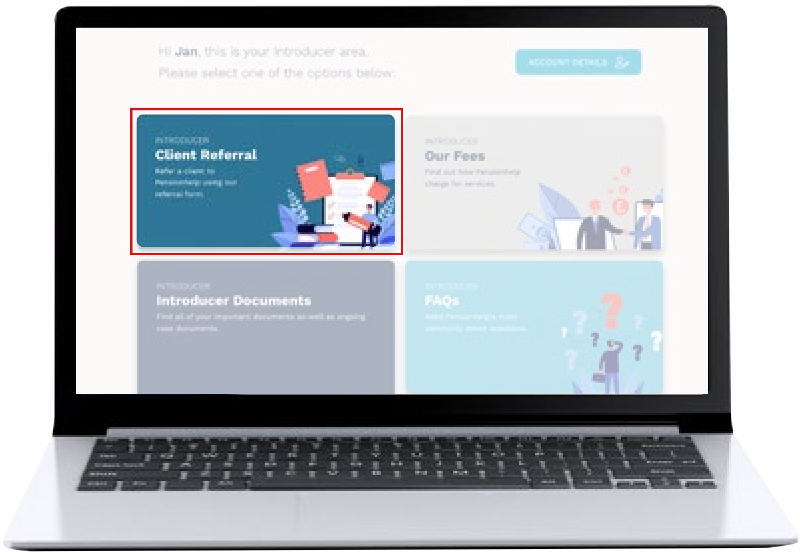
Login into Pensionhelp's referral portal;
https://pensionhelp.co.uk/introducers/client-referral/refer-a-new-client/ .

If you are registered but don't have your password, please click on 'Forgot your password' and follow the instructions to immediately generate a new one.

Please call Pensionhelp on **0161 956 2328** if you require help.

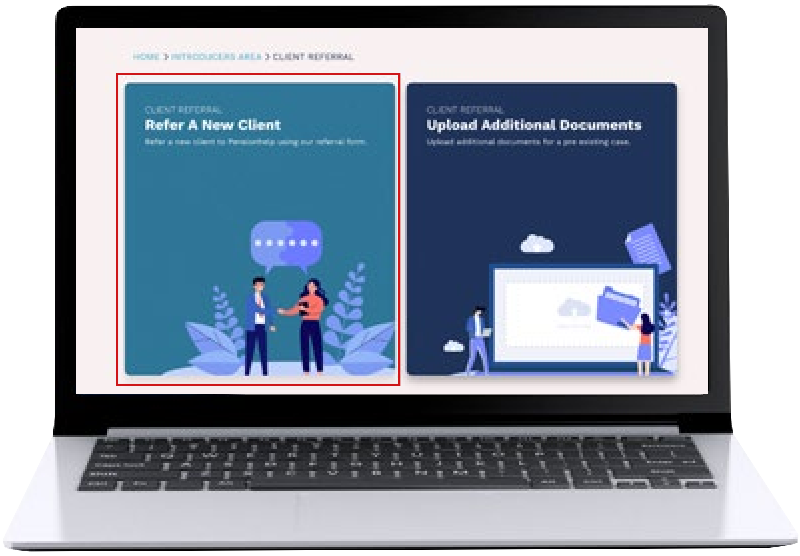
Step Two

Click on 'Client Referral'



Step Three

Click on 'Refer A New Client'

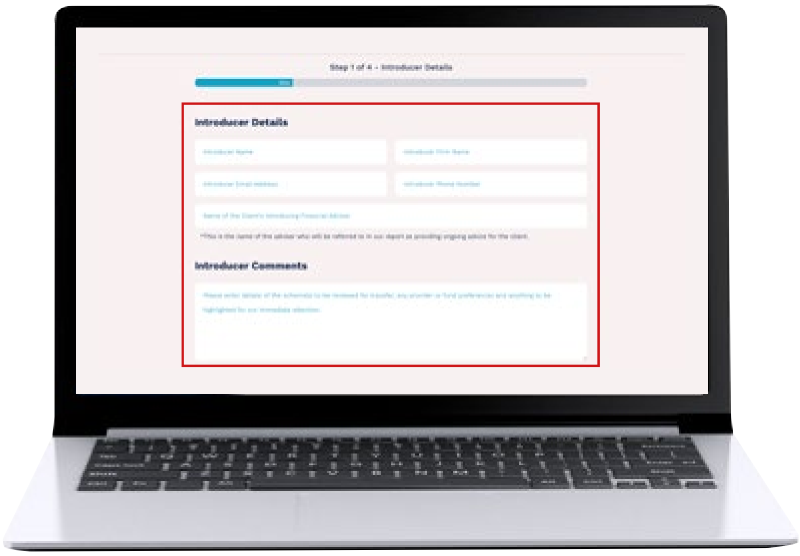


Step Four

Enter your contact details and the name of the introducing adviser (may also be yourself).

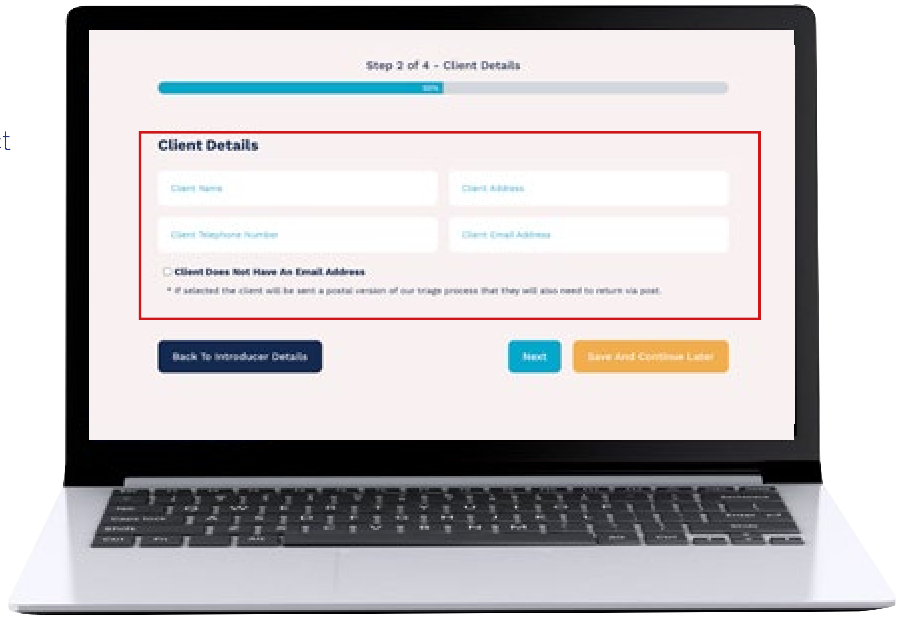
In the 'Comments' section please add any provider and fund preferences you may like for us to consider. Please also add anything that you'd like to bring to our immediate attention.

Please click on 'Next'



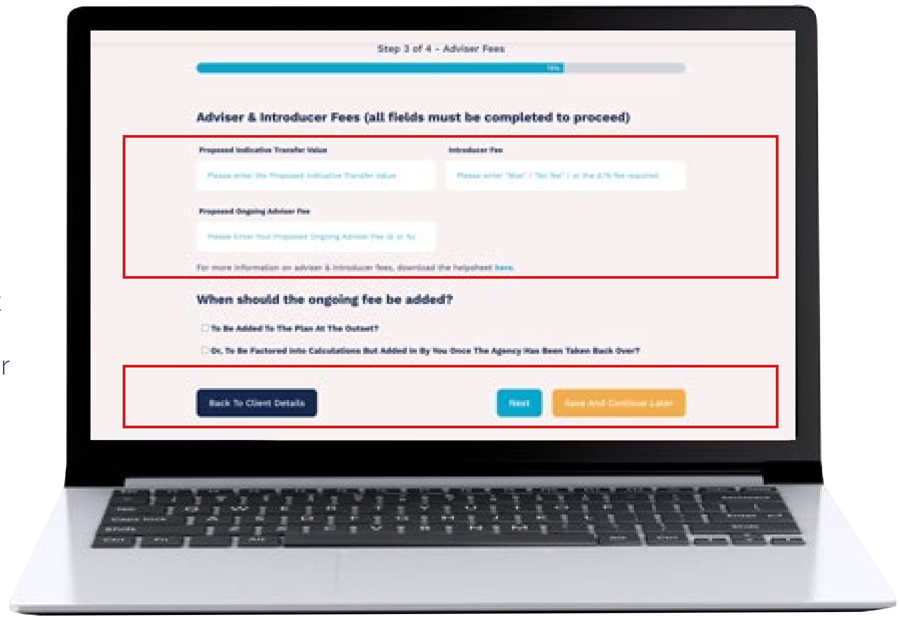
Step Five

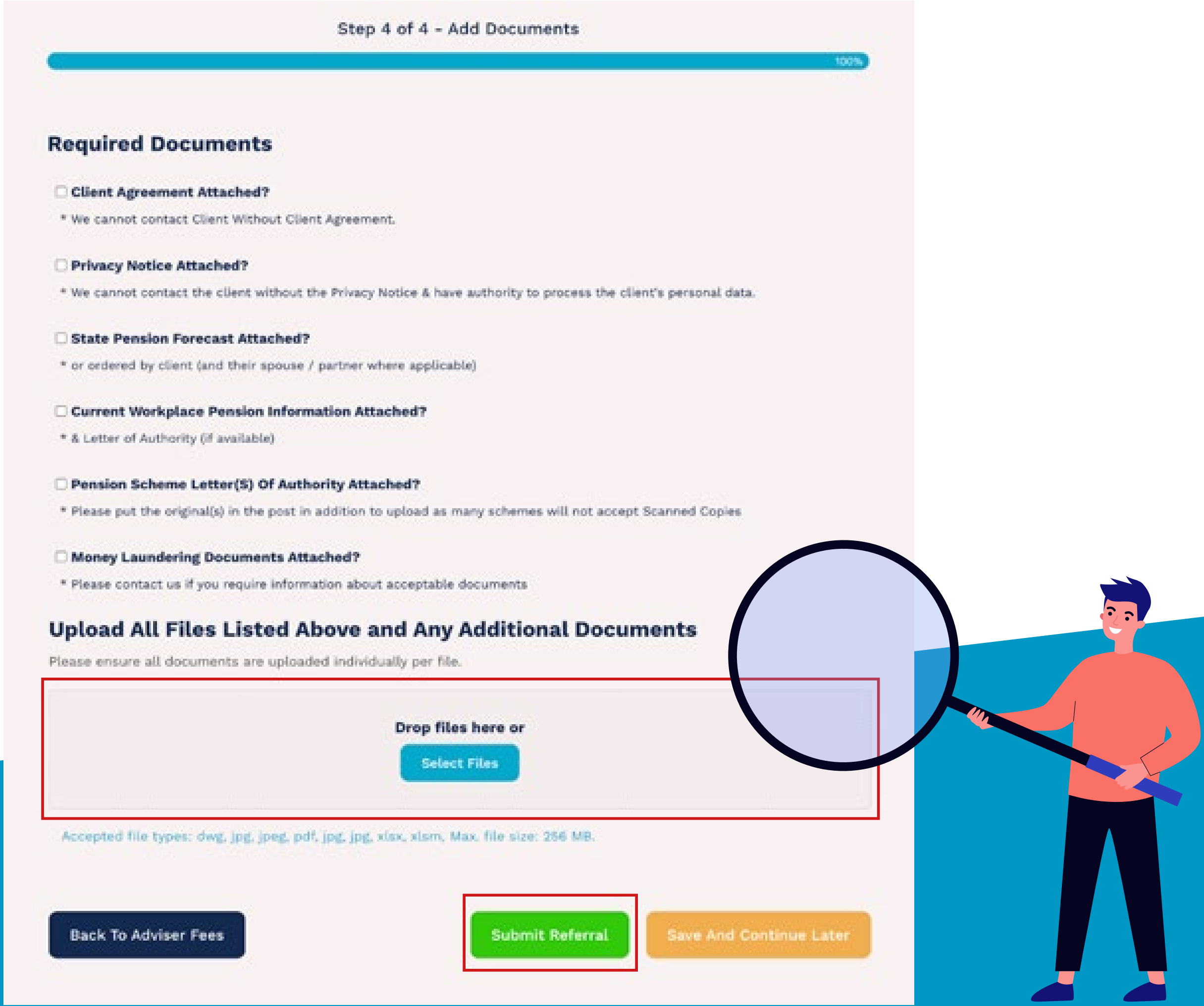
Please enter your client's contact details.



Step Six

Please enter the estimated or actual total transfer value, the amount of Introducer Fee that you wish to take (you can enter a monetary amount, 'none' or 'max'), your ongoing fee and tick the relevant box depending on whether or not you would like for us to set up any new plan with your ongoing fee.





Step Seven

Please upload any documents that you can provide. If not currently available, these can later be uploaded via or 'Additional Documentation' portal or emailed to 'enquiries@pensionhelp.co.uk'.

We will contact the client directly for any outstanding documents. Ultimately we'll need to obtain;

• Our completed Financial Review Document (Fact Find)

• LOA(s) for the scheme(s) to be reviewed for transfer

• LOA for any current workplace pension scheme (we need to consider this as a potential destination for any transfer)

• LOA (Change of Agency) for any existing plan to be topped up. (please speak to us if you have any questions about this)

• Copies of the clients ID

• State Pension Forecast for client and spouse/partner (if any)

• Any CETV or other transfer value you may have for the proposed transfer

Our LOA and Financial Review Documents can be found <u>here</u>

Please click on 'Submit Referral' to complete.

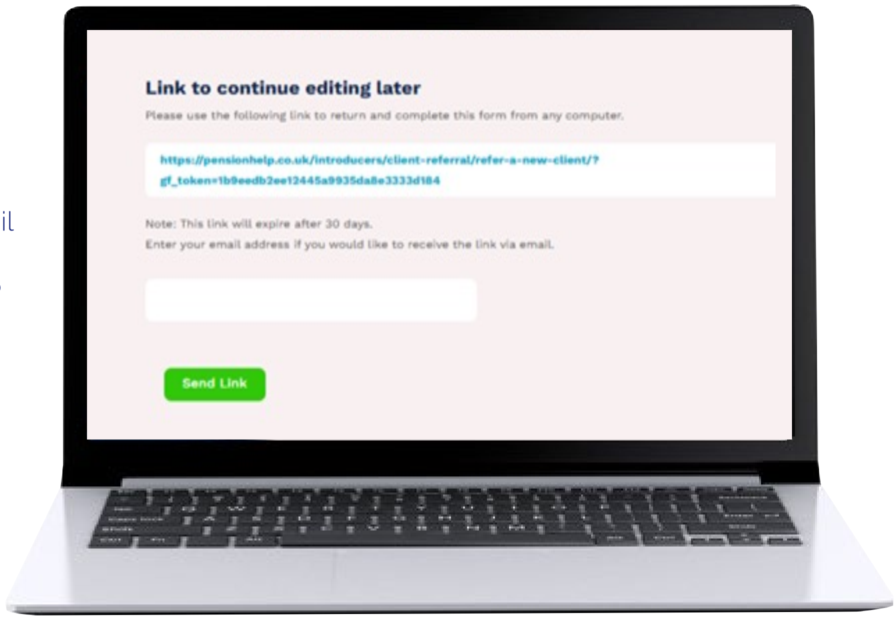
Finally...

You may wish to let your client know that you have referred them to Pensionhelp and they should look out for an email from us with a link to complete our Online Triage. Here they will confirm their acceptance of our Privacy Notice and Client Agreement (therefore, no need for you to include these documents with your referral), they'll watch an educational video about safeguarded pension benefits and they'll book a Fact Find call with us.

If you need to save and return before completing your referral then please click on the button labelled; **'Save And Continue Later'**.

However, please enter your email address and click on **'Send Link'** to receive a link to enable you to access your incomplete referral.

Please note, until you click on **'Submit Referral'** we cannot access any data that you enter onto this portal.



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