

first

## AT RETIREMENT

# 1:2:1 PREP SHEET

Please return this Prep Sheet as soon as you can. We shall use this to prepare for your 1:2:1 session. You can also record your answers in your At Retirement Booklet (the relevant places to do so are set out below).

It is important that you are as prepared as possible for your 1:2:1. Once you have answered the basic questions set out in this Sheet, there may be more preparation that would be useful for you to do. For now, please just confirm that you plan to carry out the necessary preparation, by ticking the following boxes. More information is set out in the At Retirement Booklet.

*Agree*

Think about what broad income you are going to need in retirement  
(see Chapter 4 of the Booklet)

---

Read through your Unilever UK Pension Fund retirement quotation, and think about whether any of it is not clear (see Chapters 7 and 13 of the Booklet)

---

Think about what other places you may have saved for a pension, and gather up to date information for those pensions (see Chapter 9 of the Booklet)

---

Think about what other savings and assets you have, aside from your pension savings (see Chapter 6 of the Booklet)

---

Discuss all of this with your spouse or partner  
(if you have one).

---

Please confirm that you plan to carry out the following preparation before your 1:2:1



## YOUR BASIC DETAILS

Your name:

Your date of birth:

Your retirement date:

Your State Pension Age: \*

\* If you don't know your state pension age you can find out at the following website:

<https://www.gov.uk/calculate-state-pension>

## ARE THERE ANY PARTICULAR QUESTIONS YOU'D LIKE TO COVER IN YOUR 1:2:1?

Are there any particular questions that you have about your retirement that you would like to make sure we talk about in your 1:2:1? If so, then please jot them down below:

*Box 2 in Chapter 3 of the Introductory Section of the At Retirement booklet*

## YOUR PAST EMPLOYERS AND ANY PENSION SCHEMES WITH THEM

Think back over your working lifetime. Record in the box below the employers you have worked for, how long you were at each, whether you were in a pension scheme while employed and, if so, whether you have any up to date retirement information from those schemes (if there are more than 4, then please continue on a separate sheet of paper).

Employer	Approximate years worked	Were you a member of the Employer's Pension Scheme? (Y/N)*	Do you have any up to date retirement information available on benefits in Scheme? (Y/N)*
1.		YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
2.		YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
3.		YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
4.		YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>

*Box 11 in Chapter 9 in the Preparation Section of the At Retirement booklet*

\* If you were a member of any past employers' pension schemes it would be helpful to gather up to date information on your pension from that scheme. See Chapter 9 in the Preparation Section of the At Retirement booklet.

**YOUR UNILEVER UK PENSION FUND QUOTATION:**

Please complete the following details from your Unilever UK Pension Fund Retirement Quotation:

Total pension payable from Retirement age if you take no tax free cash:

Maximum tax free cash you can take at retirement:

Pension payable from Retirement age if you take the maximum tax free cash:

Pension payable to your spouse on your death after retirement:

How much is your Investing plan account:

*Box 7 in Chapter 7 in the Preparation Section of the At Retirement booklet*

**ARE THERE ANY PARTICULAR PARTS OF YOUR QUOTATION THAT YOU WOULD LIKE TO GO THROUGH IN MORE DETAIL?**

*Box 8 in Chapter 7 in the Preparation Section of the At Retirement booklet*

When completed, please return this Prep Sheet to: [TBC]