

# Working in partnership with you



We are delighted to offer you special terms on The Retirement Account – an efficient and effective way to structure your clients’ finances both pre and during retirement. You can also access our technical and investment specialists with your questions at any time.

## The Retirement Account in a nutshell

The Retirement Account (TRA) is a modern retirement solution that allows clients to:

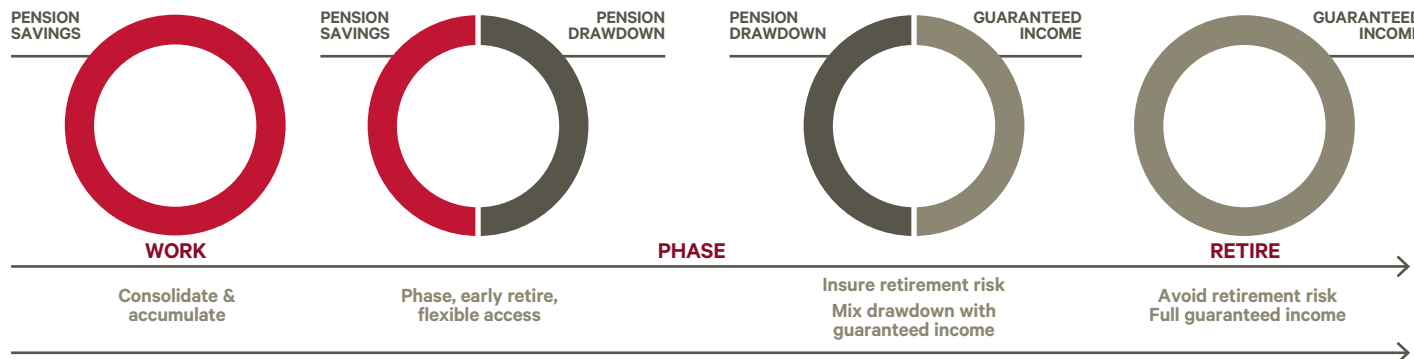
- Consolidate pensions and continue to invest and accumulate
- Progress into retirement using automated phased drawdown of tax-free cash, with a choice of flexible income drawdown, guaranteed income or a blend of both
- Access guaranteed income via an individually written annuity within the pension wrapper, which can be paid out or reinvested, providing many tax advantages
- Invest in a choice of over 2000 funds (and growing), with model portfolio manager, auto-rebalancing and ability to assign different strategies pre-and post-retirement
- Phase annuitisation to secure income as needed later in retirement

The Retirement Account (TRA) also provides:

- Simple % based charging
- Online functionality and application process
- Excellent support from Canada Life’s customer service, account management and technical teams

### Your special terms

Tiered annual product charge (deducted monthly)	Charge %
Tier 1 – up to £150,000	0.20%
Tier 2 – Between £150,000 and £1 million	0.18%
Tier 3 – Above £1 million	0.10%



## Contact us

**Stuart Mann**  
Strategic Account Manager

Call: 07803 249 343

Email: [stuart.mann@canadalife.co.uk](mailto:stuart.mann@canadalife.co.uk)

**Matt Quinn**  
Strategic Account Manager

Call: 07860 188 072

Email: [matthew.quinn@canadalife.co.uk](mailto:matthew.quinn@canadalife.co.uk)

Technical support for advisers  
ican team

[WMTechnicalSupport@canadalife.co.uk](mailto:WMTechnicalSupport@canadalife.co.uk)

Technical support or information  
on Canada Life Asset  
Management Funds

[contactclinvestments@canadalife.co.uk](mailto:contactclinvestments@canadalife.co.uk)

[canadalife.co.uk/tavistock](http://canadalife.co.uk/tavistock)

Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered in England and Wales no. 973271. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA. Canada Life Platform Limited, trading as Canada Life, is a subsidiary of The Canada Life Group (UK) Limited, and is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales no. 8395855. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA.

Canada Life and design are trademarks of The Canada Life Assurance Company.

