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:

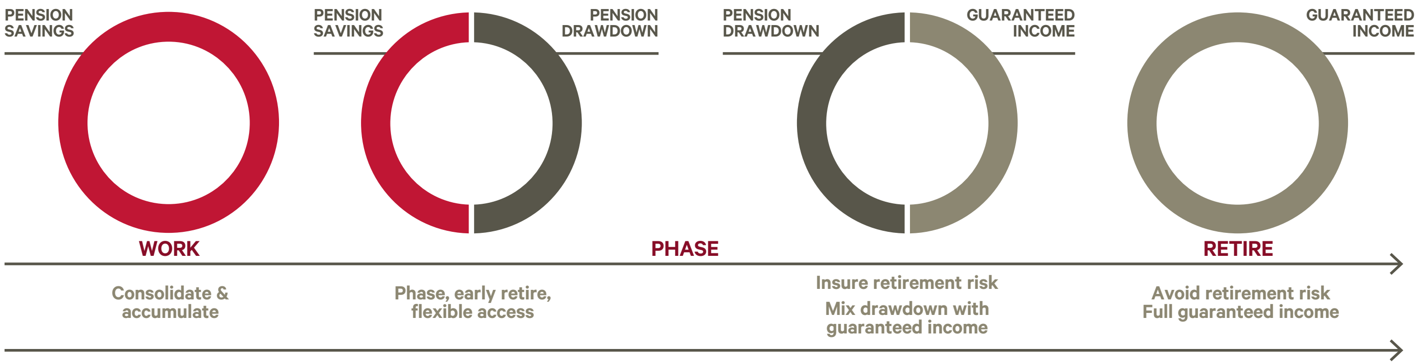
- Consolidate pensions and continue to invest and accumulate
- Progress into retirement using automated phased drawdown of tax-free cash, with a choice of flexible income drawdown, guaranteed income or a blend of both
- Access guaranteed income via an individually written annuity within the pension wrapper, 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%



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Technical support for advisers ican team

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Technical support or information on Canada Life Asset Management Funds

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canadalife.co.uk/tavistock