

The Retirement Account checklist for submitting new business

This checklist is a reminder of the key documents required when applying for The Retirement Account. All new business forms should be sent to newbusiness.ra@canadalife.co.uk. Please copy in Graeme MacKay (details below) to ensure the application runs smoothly.



New business checklist (paper-based)

- Quotation (or quote reference to / be stated on application page 1)
- **Application form** signed and completed
- Client ID and VA
- Signed declaration (page 17 of **application form**)
- Ceding scheme transfer forms (if applicable)
- **Employer contribution form** (if applicable) fully signed and completed
- **Third party contribution form** (if applicable) fully signed and completed



New business checklist (online)

- Case submitted **online**
- **Declaration form**
- **Expression of wish form** (not needed at New Business stage but useful for us to have on file)
- Ceding scheme transfer forms (if applicable)



Documentation

- Tavistock Summary document
- Pension consolidation
- Technical Summary
- Key Features
- Terms and Conditions
- Customer brochure
- Adviser brochure
- Client facing video
- Due diligence guide



Contact us

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 canadalife.co.uk/tavistock

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