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 Matt Quinn (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

Stuart Mann
Strategic Account Manager

Call: 07803 249 343

Email: stuart.mann@canadalife.co.uk

Matt Quinn
Strategic Account Manager

Call: 07860 188 072

Email: matthew.quinn@canadalife.co.uk

Technical support for advisers ican team

ican@canadalife.co.uk

Technical support or information on Canada Life Asset Management Funds

contactclinvestments@canadalife.co.uk

canadalife.co.uk/tavistock

MAR03697_0122R/B