

2 Minute Retirement Health Check

		All OK	Needs attention	Urgent!
1.	Do you have a recent projection of Pension Benefits?	Yes	Don't know	No
2.	Are your pensions on target to retire when you want to?	Yes	Don't know	No
3.	Have you used your maximum pension contribution allowance?	Yes	Don't know	No
4.	Are you getting the best returns on your savings?	Yes	Don't know	No
5.	Are pension/investment risk levels appropriate?	Yes	Time to review	Definitely not
6.	Are you satisfied with the performance of your pensions/investments?	Entirely	Would like to review	Definitely not
7.	Have you considered alternative investment strategies to pensions?	Yes	Don't know	No

Action Points

		Completed
1.		
2.		
3.		
4.		
5.		
6.		
7.		