

What To Expect From This Tool

This tool will help you to explore and understand your investment pathway options.

Investment pathways are simple, ready-made investment options, managed by your provider.

This option might be right for you if you are; aged 55 or over, have a defined contribution pension, have already worked out how much pension you could get if you stop working have decided to take or have previously taken all your tax-free lump sum leaving the rest of your pension invested and you are not considering taking financial advice.

By entering your pension pot value and your date of birth this tool can show you pension draw down products with ready made investment pathway options and allow you to compare these products by the charges for the first year.

This is not the only option for taking your pension, if you are aged 50 or over and are unsure about what you should do you can book in a free and impartial guidance session with Pension Wise, a free service from Money Helper.

Call 0800 138 3944 to book in your free appointment or visit moneyhelper.org.uk/pension-wise.