

# NHS PENSION REVIEW

## *The Process - Step by Step*

### PRE-MEETING Q&A

- Fill out a brief online form about your NHS pension and schedule a no obligation meeting.

1

### INITIAL MEETING

- Discuss your current position and determine if our bespoke NHS review is the right fit for you.

2

### DOCUMENTATION

- Confirm you are ready to proceed.
- Sign LOAs and fee agreement, and provide any relevant documents requested.

3

### REPORT BUILDING

- Our specialists will collate your information into a bespoke report.
- Both a physical and digital version of this report will be sent to you.

4

### PRESENTATION

- Attend a Teams meeting with an NHS pensions specialist to discuss important insights highlighted in your report.

5

### FOLLOW-UP REPORT

- Receive a follow up report of primary findings and topics addressed throughout the presentation.

6