

Introduction to the new Pension rules

Hello, I'm Adrian Walker the Retirement Planning Manager at Skandia. April 2011 saw the most significant changes in pension legislation for 5 years. With very limited time before the implementation of the Coalition Government changes, we thought we'd help to break down some of the key elements of the new legislation by a series of short videos which will be presented by myself and my colleague Jon Greer, our Technical Services Pensions Manager.

These videos will cover issues such as the Annual Allowance, the new carry forward of unused relief rules, pension input periods, the impact of the change to the Lifetime Allowance schedule for the end of this tax year and how it will impact clients with benefits protected at A-Day some 5 years ago.

Many of the issues will interlink between the 5 videos. But in breaking these areas down into smaller components and linking them to material already available on our Knowledge Direct Site, we hope they will help you understand and look at the planning opportunities that the new legislation provides.

We would certainly welcome feedback from yourselves in terms of how we may be able to develop and approve these lines of communication in the future, so please e-mail us back using the e-mail link that is attached to the knowledge direct site where these videos will be found.

Thank you.

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