

Pension Tracker

Frequently asked questions

- **Which plans will get access to Pension Tracker?**

The following plans will have access to Pension Tracker:

Product Type	Naming - post June 2009 re brand	Rules	Policy number range	
Individual	CGU Personal Pension Plan	UK	96000000	99999999
Individual	CGU Personal Pension Plan Lifestyler Plus	UK	96000000	99999999
Individual	Your Pension @ Aviva	UK	SQ93200000	SQ93299999
Individual	Personal Pension	UK	TL94000000	TL94569999
Individual	Commercial Union Personal Pension Plan	UK	96000000	99999999
Individual	Income Drawdown	UK	DD94800000	DD94999999
Group & Individual	PERSONAL PENSION PLAN (98 SERIES) (UK)	UK	TK91000000	TK91499999
Individual	STAKEHOLDER PENSION	UK	SM93300000	SM93999999
Group & Individual	THE PERSONAL PENSION PLAN (IOM)	IOM	MX90050000	MX90999999
Group & Individual	COMPANY PENSION @ AVIVA (IOM)	IOM	MX90050000	MX90999999
Group & Individual	THE PERSONAL PENSION PLAN (UK)	UK	TK91500000	TK91999999
Group & Individual	COMPANY PENSION @ AVIVA	UK	TK91500000	TK91999999
Individual	Pre-95 Personal Pension Plan (UK)	UK	PP44000001	PP44999999
Group & Individual	Company Stakeholder Pension @ Aviva	UK	SP93000000	SP93199999
Individual	Your Pension @ CGU	UK	96000000	99999999
Individual	Your Pension@Aviva	UK	96000000	99999999
Individual	Your Pension Select @ Aviva	UK	96000000	99999999

- **For my customers with permitted plans, where can they access Pension Tracker?**

Customers can register and access Pension Tracker at www.aviva.co.uk and www.controlyourpension.com.

- **Where can my customer find out more about Pension Tracker and Aviva Pensions?**

Customers can see a demo and a video of the site, and find out more about pensions generally at www.controlyourpension.com and www.aviva.co.uk
 You can also find a customer brochure providing an overview of Aviva pensions and Pension Tracker at www.controlyourpension.com/adviser.

- **I can't see the videos on the Pension Tracker site, why not?**

In order to view the videos, you need to have Flash version 9.2 or above installed onto your computer. If you don't have this, download it for free now at www.adobe.com

- **I can't see the demo of the Pension Tracker site, why not?**

The Pension Tracker demo can't be viewed with a MAC computer. You will need to view the demo from a PC.

- **If my client(s) makes a change on Pension Tracker, will I be paid commission?**
Yes, you will be paid commission in line with the commission basis you have agreed with your client(s). This commission will be shown on your commission statements.
- **Once I've logged in to Aviva for Advisers secure services area, how do I find Pension Tracker?**

You can access Pension Tracker by following the instructions below.

Step 1:

NORWICH UNION
an AVIVA company

Adviser Sales Centre
Secure Services

Welcome Home Change Details Contact Us Log off

Adviser Sales Centre Home
Bond Valuation
Policy Enquiry
New Business Tracking
Bulk Data Download
Forecast Planning Tool
Site Maintenance
Service Availability
Product Literature
Fund Information
Trust Information
Reasons Why statements

Need Help?
If you need help using this site please contact our e-commerce service desk on 0845 309 3999

Investment							
Portfolio Level Option	Quote	Retrieve Quote	Apply	Tracking	Bond Valuation		
Portfolio Step Down Option	Quote	Retrieve Quote	Apply	Tracking	Bond Valuation		
Protection							
COB Regulated Term Assurance (Use to transfer from paper form only)	Quote	Retrieve Quote	Apply	Retrieve Application	Tracking	Date of Commencement	
Pure Protection (COB) Term Assurance (Use to transfer from paper form or if your client is with you)	Quote	Retrieve Quote	Apply	Retrieve Application	Tracking	Date of Commencement	
Mortgage Life Insurance (Use to transfer from paper form only)	Quote	Retrieve Quote	Apply	Retrieve Application	Tracking	Date of Commencement	
Mortgage Life Insurance (Use if your client is with you)	Quote	Retrieve Quote	Apply	Retrieve Application	Tracking	Date of Commencement	
Critical Illness	Quote	Retrieve Quote	Tracking				
Guaranteed Whole of Life	Quote	Retrieve Quote	Tracking				
Simplified Life Insurance	Quote & Apply	Retrieve Application				Date of Commencement	
Healthcare							
Safeguard Income Protection	Quote	Retrieve					

Click 'policy enquiry'

Step 2:

NORWICH UNION
an AVIVA company

Adviser Sales Centre
Secure Services

Welcome, I [Home](#) [Change Details](#) [Contact Us](#) [Log off](#)

Individual business [EXIT](#)

For an individual policy, member or account enquiry

Enter policy, member or account number [ENQUIRE](#) [HELP](#)

For a full list of valid policy, member or account numbers please click on help.

Step 3:

AVIVA **Adviser Sales Centre**
Secure Services

Welcome, b [Home](#) [Change Details](#) [Contact Us](#) [Log off](#)

Individual business [EXIT](#)

Policy Asset Mix and Retirement Planner (select Pension Tracker)

[Pension Tracker](#)

Policy Values

Values **Contract** Client Contribution Projection

General Details

Policy/Member No.

Policyholder Member Name

Status

Messages

Total Pre-Retirement Fund Value £ 123,456.12

Transfer Value

Pre-Retirement Transfer Value as at 01/01/2000 £ 345.00

Pre-Retirement Fund Details

Step 4:

NORWICH UNION
an AVIVA company

Log Out

Advisor policy enquiry

You are now leaving the Advisor Sales Centre (ASC) and are about to enter the Adviser Pension Zone where you will have access to the new 'Pension Tracker' service.

Pension Tracker is our consumer facing site, designed for you and your clients to keep track of their retirement planning. Both you and your clients can perform various tasks with the online tools. The list below gives a brief outline of the site and its functionality.

Hit the 'Proceed' key if you want to continue or the 'Back' key if you want to return to the ASC.

Pension Tracker - the site for you and your clients

Personal Information	<i>View client details</i>
Plan value	<i>See the current value of each plan against amount paid in</i>
Payments	<i>See breakdown of payments in and out</i>
Investments	<i>View portfolio split and their associated fund values</i>
Retirement planner	<i>See projections based on current circumstances. Use the 'What If' calculator to model changes and compare</i>

[Back](#) [Proceed](#)

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Aviva.com | MakeSenseofit.com

Click 'Proceed' to start using Pension Tracker