

# PATH TO YOUR PENSION



Unilever



THIS CHECKLIST WILL HELP YOU KEEP ON TOP OF WHO HAS TO DO WHAT – AND WHEN.

# ON THE HOME STRAIGHT

Thinking of taking your Unilever pension in the next 12 months? We hope you're looking forward to a long, happy and healthy retirement.

Just before you head off, though – there is a bit of admin to do, to make sure you get the right benefits, at the right time.

Our teams work together to try and make the process of leaving Unilever and drawing your pension as easy as possible for you – you can read about them on the next page. But at certain stages, you'll need to take action to make everything run smoothly.

**SO... REMEMBER THE '6...3...1' COUNTDOWN – FOLLOW THE ROUTE AND YOU WON'T MISS A TURNING.**

# GIVING YOU DIRECTIONS

To use the checklist, just turn over this leaflet and open it out – all you need to do is follow the road from left to right, and tick off the stages as you go along.

Try to ask the Unilever Pensions Team for a retirement quote about **SIX** months before you want to stop work. This will give you time to ask for more details if you need them. (We know it may not be possible to plan six months ahead. If you're in this position, you may still be able to retire when you want to – but the earlier you start the process, the greater opportunity for your benefits to be set up on time.)



With about **THREE** months to go, you need to decide and agree a retirement date with your manager and we can start arranging payment of your benefits.



You'll receive a pack confirming your benefits with some forms to fill in – and we'll need those back about **ONE** month before you actually retire.



Please note: early retirement is with the consent of Unilever and the Trustees.

# SUPPORTING CAST

These are the teams helping you reach your destination – along with their contact details.

## Unilever Pensions Team at Capita

The team administer the Fund – they will send you all your retirement paperwork and arrange payment of your benefits. They should be your first port of call if you have any questions, and cannot find the answer on the Fund website or in your plan guides.

Phone: **0800 028 0051**

E-mail: **[unileverpensionsteam@capita.co.uk](mailto:unileverpensionsteam@capita.co.uk)**

Website: **[www.uukpf.co.uk](http://www.uukpf.co.uk)**

## HR Services

HR will update your records at the right time and confirm to the Unilever Pensions Team that they can pay your benefits.

# 'MONEY MATTERS'

Remember you can arrange a one-to-one session with an expert to talk through your choices. Just write an e-mail to First Actuarial at **[unilever121@firstactuarial.co.uk](mailto:unilever121@firstactuarial.co.uk)** and the team will be in touch.



> Ask the Unilever Pensions Team at Capita for a quote (or quotes), telling them the date you want to retire.



The aim is to send the information within 10 working days.

> If you have any questions about the quote, or you want to ask about getting more quotes for different options, call the Unilever Pensions Team.



> ...and don't forget to book a 'Money Matters' one-to-one session to talk through your choices (see overleaf).



- > You
- > Manager/HR
- > Administrator

You can keep asking for further quotes or information until you are happy...

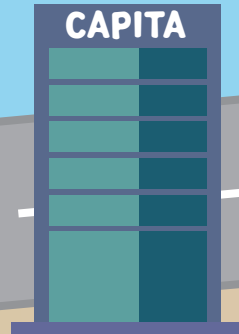
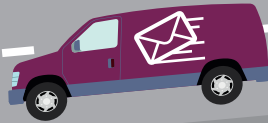




Let your line manager know you're planning to retire - and your proposed retirement date.



3 MONTHS



Your manager or HR will update your resignation details on Workday.



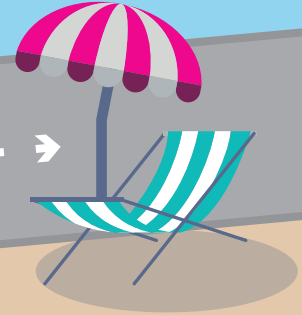
HR will confirm the date you're retiring with the Unilever Pensions Team – who will send your retirement pack to your home address.



Fill in the option forms  
in your pack and return  
them to the Unilever  
Pensions Team.



1 MONTH



(Give them a nudge if  
there's any delay!)



The Unilever Pensions Team will aim to  
pay your pension from the first payroll  
date (normally the 21st of each month)  
after you retire, along with any tax-free  
cash you decide to take.



Both the pension and any cash will go  
into the bank account you tell us about  
on your forms.