

You receive a pensions case you do not want to deal with and decide to refer it to Lighthouse+.

You call Lighthouse+ on 0845 872 3999 or email Mark Wilson at mark.wilson@lighthouseplus.co.uk with details of the case.

You may include a Factfind and Risk Profile with the information. If you do not, you will receive a reduced percentage of the total fee/commission.

You agree with Lighthouse+ the remuneration structure for the case.

Lighthouse+ sends a written acknowledgement to you and to your client.

Lighthouse+ requests information from the scheme or insurance company.

Lighthouse+ deals with communications and administration.

Lighthouse+ sends a report to your client and then sends you a copy. We make a follow-up call to your client to discuss any queries.

If your client goes ahead with the recommendations, **Lighthouse+ ensures** they are carried out and sends your client their policy document and a copy to you.

Lighthouse+ has no further contact with your client unless you request it.