

The Retirement Account Dashboard

How do I amend income?

Hints and tips for amending a client's income online via The Retirement Account Dashboard.

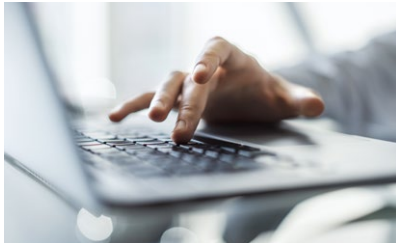
Before you start



You can amend either the amount of the regular payment or cancel the payment. To amend the income frequency or the income payment date, please contact Customer Services.



If the next income payment is due within two working days payment cannot be stopped as the system will have already generated the payment due.



Navigation from main dashboard

- Search for your client and then select **view**
- In the **products** section, click on the link '**The Retirement Account**'
- In the **crystallise & payments out** area click on the three dots next to the regular payment you wish to amend

How do I.....

- Select **cancel** to cancel the regular payment
- Select **edit** to amend the regular payment
- Insert the new amount and select **update**
- To take a fee, open up the **fees & charges** section, add the amount and select **confirm**
- Click on **generate illustration**
- An illustration will be generated. **Please save a copy of the illustration as it can only be retrieved later if you proceed with the application**
- Confirm the declaration and then select **complete**

Need further support?

User guide

A detailed user guide covering all functionality available via The Retirement Account Dashboard is available [here](#).



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