

PERSONALISED VIDEO STATEMENTS

Helping clients better understand their pension while supporting the advice process.

We have launched personalised video statements for IFGL Pensions customers. These bite-sized animated videos bring to life annual pension valuations in a clear and engaging way.



What is a personalised video statement?

Customers receive a short, personalised video alongside their annual Self-Invested Personal Pension (SIPP) valuation email, which will:

- Use their actual policy data (pot value, contributions and projections)
- Explain their position clearly and visually
- Complement, rather than replace, existing documentation



At around one minute long, the videos provide key information to help customers stay connected to their SIPP, in an engaging, conversation-provoking way.



The animated update around the value of their SIPP is designed to sit alongside and complement the broader holistic advice conversations that advisers will regularly carry out with clients.



What the video includes

- The customer's name
- Current pot value and how it has developed
- Future projections based on current contributions
- Their adviser's details and signposting to their adviser for queries
- A reminder to let us know if their contact details change



Why it matters?

Pensions and investments can be complex and difficult to engage with. Personalised video:

- Simplifies information that is often overlooked
- Brings individual data to life in an intuitive format
- Drives significantly higher engagement with annual statements (up to 92% completion compared with typical email engagement rates of 20-25%)



Customer experience

The video is designed to:

- Provide a simple, visual explanation of pension and investment information
- Make complex details easier to understand
- Highlight areas that may benefit from further review



Key benefits

The video is designed to:

- Helps customers understand their current position quickly
- Encourages more informed decision-making
- Prompts customers to speak to their adviser about any action needed to stay on track for their retirement goals.



Personalised video statements are designed to support the advice process and strengthen the conversation between advisers and their clients.

Supporting advice through better client engagement.

