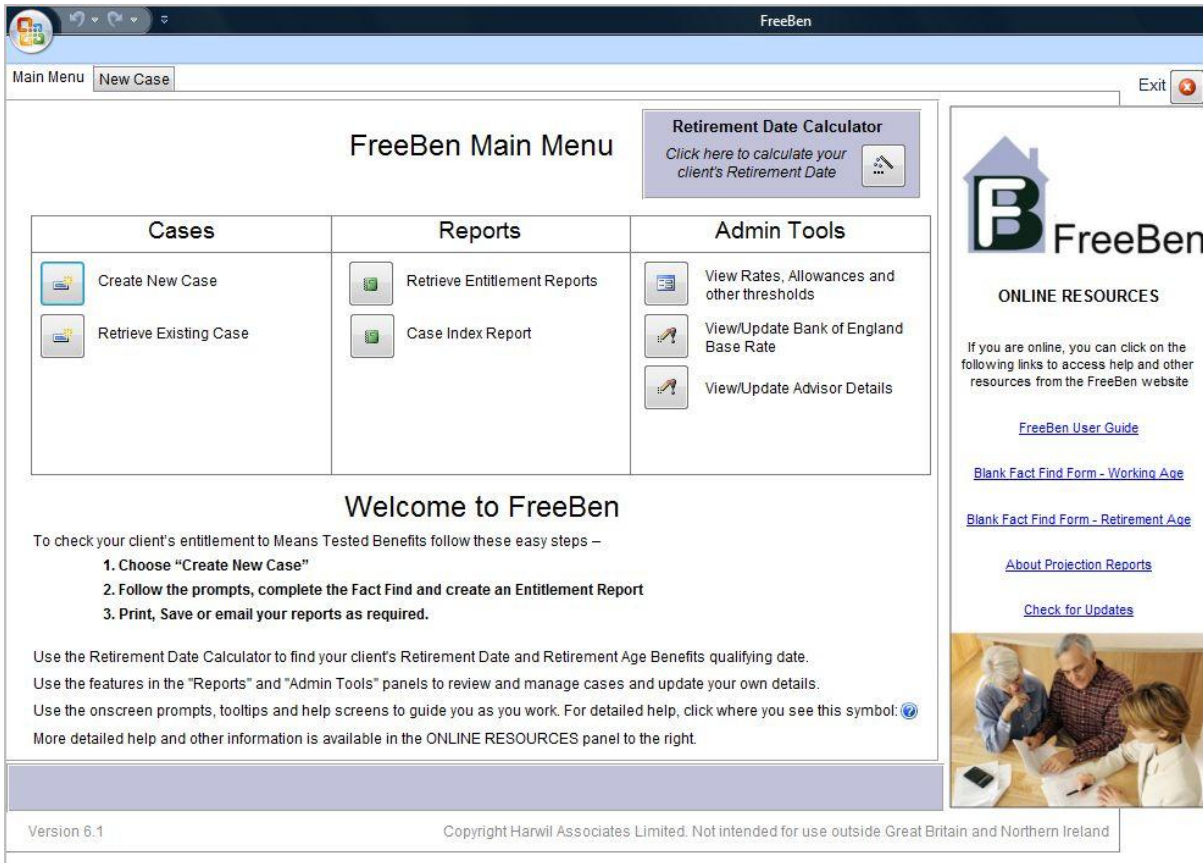


## FREEBEN MAIN MENU


This is the Home screen for FreeBen, where you can create new cases and access a range of other program features. Creating a new case takes seconds – just click on the “Create New Case” button and you will be taken to a “smart” Fact Find. Go through the forms in order, and you will arrive at the Entitlement Report Menu.



The screenshot shows the FreeBen Main Menu interface. At the top, there is a navigation bar with 'Main Menu' and 'New Case' buttons, and an 'Exit' button. The main content area is titled 'FreeBen Main Menu' and is divided into three columns: 'Cases', 'Reports', and 'Admin Tools'. The 'Cases' column contains 'Create New Case' and 'Retrieve Existing Case'. The 'Reports' column contains 'Retrieve Entitlement Reports' and 'Case Index Report'. The 'Admin Tools' column contains 'View Rates, Allowances and other thresholds', 'View/Update Bank of England Base Rate', and 'View/Update Advisor Details'. To the right of the main menu is a 'Retirement Date Calculator' box with a link to calculate retirement date. Below the main menu is a 'Welcome to FreeBen' section with instructions on how to use the system. At the bottom right, there is an 'ONLINE RESOURCES' panel with links to 'FreeBen User Guide', 'Blank Fact Find Form - Working Age', 'Blank Fact Find Form - Retirement Age', 'About Projection Reports', and 'Check for Updates'. A small image of three people looking at a document is also present in the resources panel. The footer contains 'Version 6.1' and 'Copyright Harwil Associates Limited. Not intended for use outside Great Britain and Northern Ireland'.

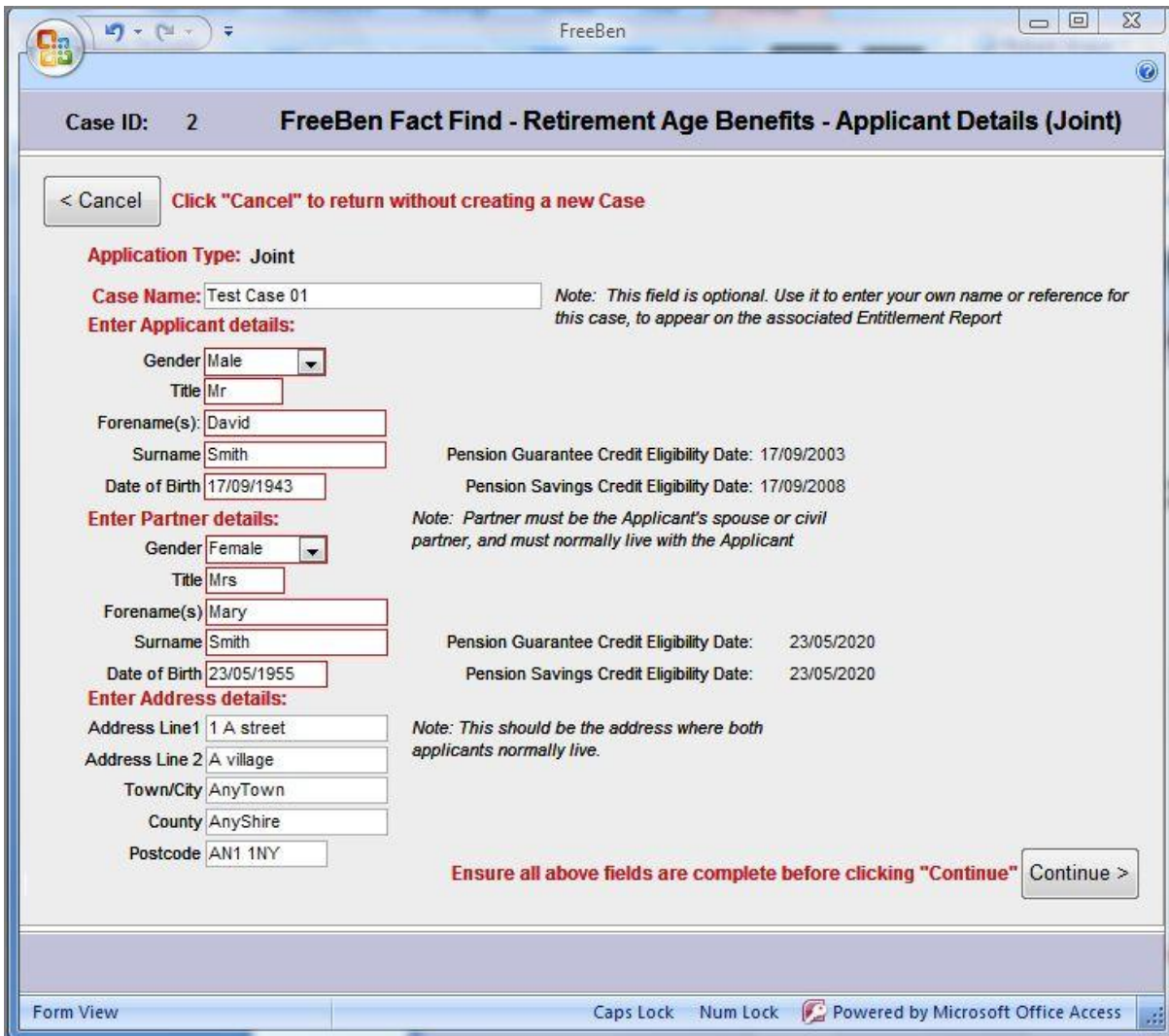
We’ve designed FreeBen with a clean, simple look and feel. If you are online, you can use the panel on the right to access a host of help files and other utilities.

At the bottom left of the screen are tool tips to guide you when completing the fields in the forms.

-  Where you see the blue question marks you can click to view context-sensitive help screens

## FREEBEN FACT FIND

This is one of the screens in the Fact Find, where FreeBen gathers relevant information about your client's circumstances. We've kept this down to a minimum, and added notes to guide you as you go along.



Case ID: 2      **FreeBen Fact Find - Retirement Age Benefits - Applicant Details (Joint)**

< Cancel      Click "Cancel" to return without creating a new Case

**Application Type:** Joint

**Case Name:** Test Case 01      *Note: This field is optional. Use it to enter your own name or reference for this case, to appear on the associated Entitlement Report*

**Enter Applicant details:**

Gender: Male  
 Title: Mr  
 Forename(s): David  
 Surname: Smith  
 Date of Birth: 17/09/1943

Pension Guarantee Credit Eligibility Date: 17/09/2003  
 Pension Savings Credit Eligibility Date: 17/09/2008

**Enter Partner details:**

Gender: Female  
 Title: Mrs  
 Forename(s): Mary  
 Surname: Smith  
 Date of Birth: 23/05/1955

*Note: Partner must be the Applicant's spouse or civil partner, and must normally live with the Applicant*

Pension Guarantee Credit Eligibility Date: 23/05/2020  
 Pension Savings Credit Eligibility Date: 23/05/2020

**Enter Address details:**

Address Line 1: 1 A street  
 Address Line 2: A village  
 Town/City: AnyTown  
 County: AnyShire  
 Postcode: AN1 1NY

*Note: This should be the address where both applicants normally live.*

**Ensure all above fields are complete before clicking "Continue"**      Continue >

Form View      Caps Lock    Num Lock    Powered by Microsoft Office Access

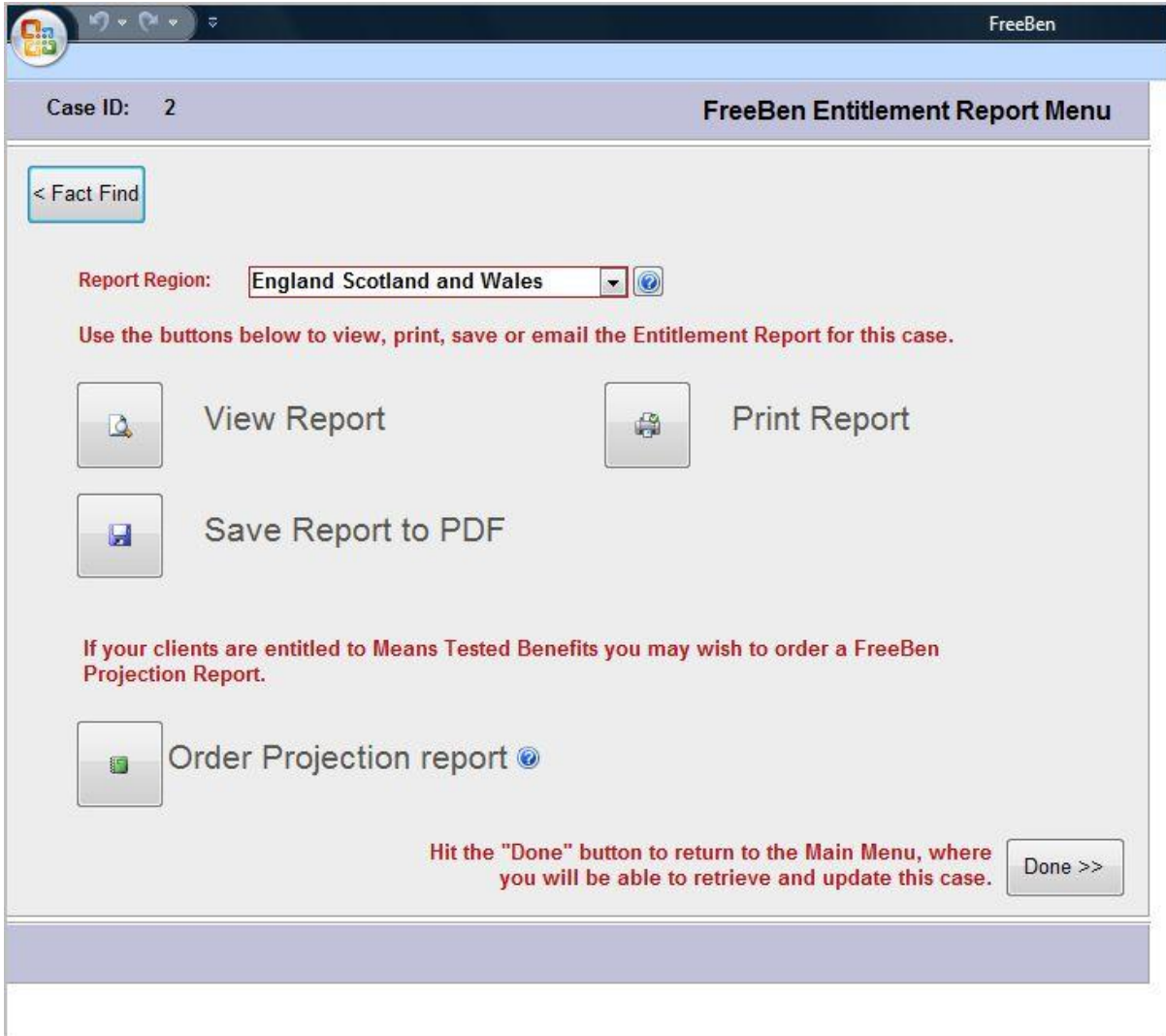
Go through the fields in order (using the Tab key) and enter the information requested.

If you need to retrace your steps you can click back to previous screens, or cancel the Fact Find altogether.

As you enter the information, FreeBen automatically calculates the relevant Pension and Benefit eligibility dates and displays them onscreen.

## ENTITLEMENT REPORT MENU

This is the final screen in the Fact Find. From here you can view the Entitlement Report, and you can still go back to previous screens to correct your answers if need be.



The screenshot shows a web browser window with the FreeBen logo in the top right corner. The page title is "FreeBen Entitlement Report Menu". On the left, it says "Case ID: 2". Below this is a navigation link "< Fact Find". The main content area has a "Report Region:" dropdown menu set to "England Scotland and Wales". Below the dropdown is a red instruction: "Use the buttons below to view, print, save or email the Entitlement Report for this case." There are three buttons: "View Report" (with a magnifying glass icon), "Print Report" (with a printer icon), and "Save Report to PDF" (with a floppy disk icon). Below these is another red instruction: "If your clients are entitled to Means Tested Benefits you may wish to order a FreeBen Projection Report." There is a button "Order Projection report" (with a document icon). At the bottom right, there is a "Done >>" button. A red instruction at the bottom reads: "Hit the 'Done' button to return to the Main Menu, where you will be able to retrieve and update this case."

Changing the "Report Region" option at the top of the screen enables you to produce Entitlement Reports for England Scotland and Wales, or for Northern Ireland

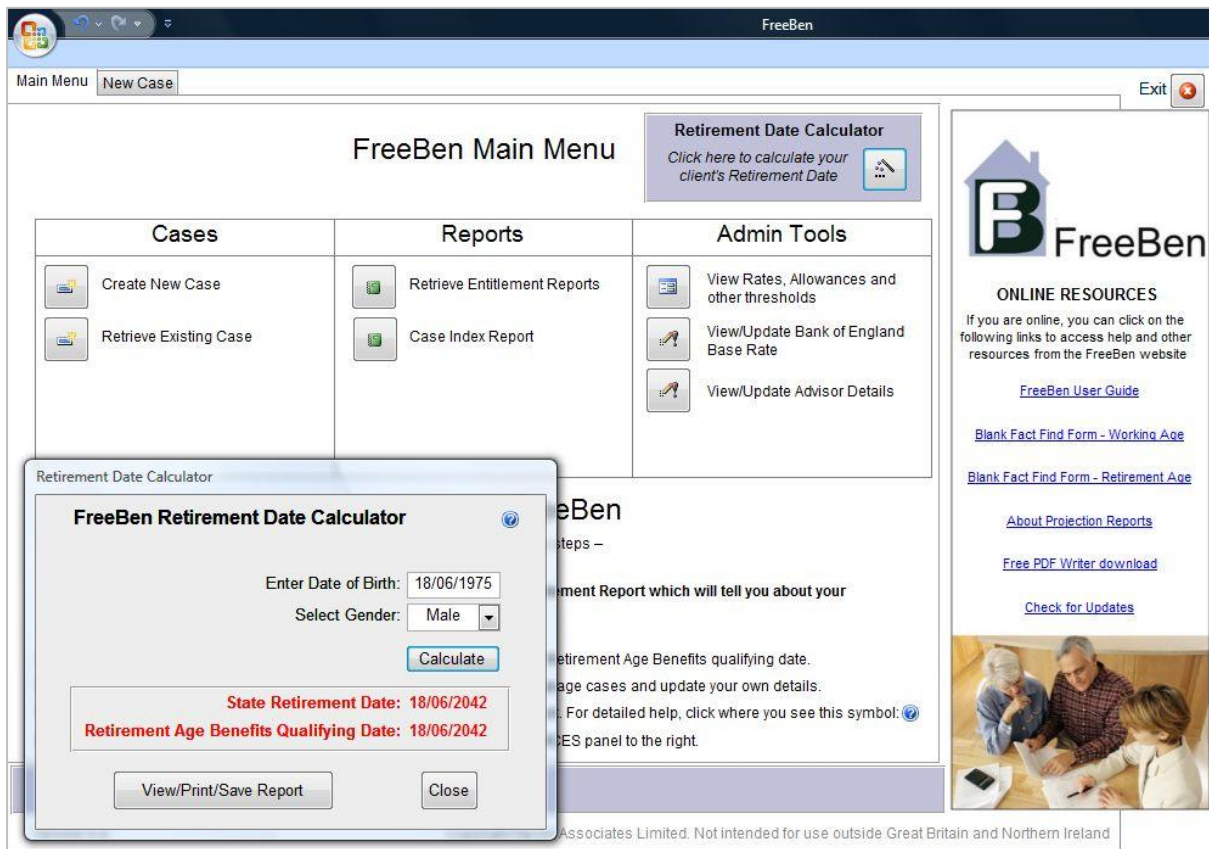
Once you have finalised your Entitlement Report, click on "Done" and it will be saved for retrieval from the Main Menu.

If you aren't able to complete the Fact Find at this stage, you can click "Done" anyway, and the case will still be saved so you can come back and complete the missing information later on.

## RETIREMENT DATE CALCULATOR

State Retirement dates will be changing over the coming years until by 2044 everyone will reach State Retirement Age at 68. So that you can be sure just when your clients will reach State Retirement Age, we provide a Retirement Date calculator – just click on the button, enter the client's gender and date of birth and the dates will appear onscreen.

You can also save or print the results and hand them to your client.



The screenshot displays the FreeBen software interface. The main menu is titled "FreeBen Main Menu" and is divided into three sections: "Cases", "Reports", and "Admin Tools".

- Cases:** Create New Case, Retrieve Existing Case
- Reports:** Retrieve Entitlement Reports, Case Index Report
- Admin Tools:** View Rates, Allowances and other thresholds; View/Update Bank of England Base Rate; View/Update Advisor Details

A "Retirement Date Calculator" button is located in the top right of the main menu. A pop-up window titled "FreeBen Retirement Date Calculator" is open, showing the following input fields and results:

- Enter Date of Birth: 18/06/1975
- Select Gender: Male
- Calculate button
- State Retirement Date: 18/06/2042
- Retirement Age Benefits Qualifying Date: 18/06/2042
- View/Print/Save Report button
- Close button

The background interface also features a sidebar with "ONLINE RESOURCES" including links for "FreeBen User Guide", "Blank Fact Find Form - Working Age", "Blank Fact Find Form - Retirement Age", "About Projection Reports", "Free PDF Writer download", and "Check for Updates".

## FURTHER INFORMATION

All you need to know about FreeBen can be found on our website [www.freeben.co.uk](http://www.freeben.co.uk) or by getting in touch with us using the details on our "Contact Us" page.