



SUCCEVOL TOT EN MET  
**PENSIOEN**

**Our company was the first organisation to look at retirement planning in an innovative way, considering the financial and mental aspects of the retirement journey.**

#### **Things had to change**

In 2012, the state pension age started to rise, and most early retirement schemes were cut back or abolished. It made you work longer hours. But most people still didn't look beyond the monthly amount that the pension represented. In short: things had to change, and so we did. In addition to money, we also looked at health, job satisfaction, relationships, and activities outside work. Demand increased and Dutch competitors followed our approach, which was a great compliment for us.

#### **Combination of financial and mental guidance**

In addition to the combination of financial and mental guidance, we developed career training courses and later also offered our financial and mental components separately. Until the irrevocable question arose in what we really distinguish ourselves and what we are good at. A clear starting point was the praise from customers about the added value of mental guidance in our pension planning processes. We rediscovered our specialty. Since the summer of 2022, we have focused exclusively on the essential combination of financial and mental guidance. Our customers? They look forward to a good pension with an optimal arrangement.

#### **Thorough but straightforward process**

In 2021 we were invited by ABN AMRO to become a member of FSQS-NL. Completing the first FSQS-NL questionnaire was a thorough and straightforward process. Information is collected using answer options, which makes filling out faster compared to traditional questionnaires. It encouraged us to review our policies and processes and improve them where necessary. We maintain control of our information by amending or updating the FSQS-NL online portal each year with our most up-to-date company data.

#### **Collaborating more efficiently with financial institutions**

By collecting, validating, and auditing our information, FSQS-NL gives us assurance that our policies, processes, and data are of the appropriate quality required by financial institutions. This gives us the opportunity to collaborate more efficiently with financial institutions.



"We are pleased to have joined FSQS-NL as a credible and reliable retirement planning service provider. It makes it easier and more fun for us and our (potential) customers to do business."

**Emiel Egging**  
Managing Director,  
Succesvol tot en met Pensioen