Indicative estimate — line by line

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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What it says, and what makes it provisional · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Indicative estimate, not binding: only the fund's official statement is authoritative.** That statement appears in the body of the letter, in the same size as the amount — the only way it gets read.

What the estimate sent to the member contains

Section	Content	Why it is there
Estimated amount from the base scheme	Kept separate	**A member who sees a single figure always takes it for the total**
Estimated amount from the supplementary scheme	Kept separate	The two schemes are not awarded in the same place
Quarters taken into account	Number and detail by scheme	That is what the member can usefully challenge

Section	Content	Why it is there
Retirement age envisaged	The one in the request	An estimate only means something against a date
Reduction or increment applied	Where applicable, with its rate	*A decrease if retirement occurs without meeting the full-rate conditions, an increase if it is deferred*
Periods not yet consolidated	**Listed, with their quantified effect**	**An estimate that shows what is still to be claimed is an estimate the member can use**

The unconsolidated periods of this file

Period	Status	Effect on the estimated amount if validated
1999-2001, 8 quarters	**Correction requested on 14 March, chaser planned for 14 April**	**+€74 a month**
2001, national service	Document awaited from the member	Included in the 8 quarters above
1998, discrepancy between two schemes	Settled on the documents, correction line ready to sign	1 quarter, marginal effect on the amount, none on the date

Time to handle an estimate request

Item	Before	After	What the remaining time becomes
Writing the reply letter	**40% of the handling — 35 minutes**	**10% — 9 minutes**	**The adviser's review, and nothing else**
Time to answer the member	**Three weeks**	**48 hours**	Call-backs disappear along with the waiting

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Who performs what, and on what basis

Act	Who performs it	Basis
Award the pension	**The pensions adviser**	**A decision producing legal effects for a person is not taken on the sole basis of automated processing**
Notify the final amount	The fund	Only the official statement is authoritative
Choose the retirement date	**The member, on the four scenarios already quantified**	Her health, her partner's situation and her plans appear on no career record — the comparison itself is done

The adviser's decision is not shortened: it is prepared. It takes ten minutes instead of two hours, and it remains entirely theirs.

Estimate reviewed and approved by adviser _____ on _____

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> https://bluelemonagent.ai/en/secteur-public/metiers/agent-ia-conseiller-retraite

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