

# Pension commencement lump sum and income drawdown form



Title	
Surname	
Forename(s)	
SIPP number	

## Pension commencement lump sum

Amount to be paid	<input type="checkbox"/> Maximum (25%) <input type="checkbox"/> Other £
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## Income drawdown

Drawdown amount	<input type="checkbox"/> Maximum <input type="checkbox"/> Minimum <input type="checkbox"/> Specified amount £								
Frequency	<input type="checkbox"/> Annually <input type="checkbox"/> Half-yearly <input type="checkbox"/> Quarterly <input type="checkbox"/> Monthly								
Start date <i>month/year</i>	<table border="1"> <tr> <td></td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table>				/				
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## Member's bank account details

Account name	
Sender account number	
Sender sort code	- -
Building society reference	
Bank name and branch address	

## Additional information required

As of 5 April 2006, I was receiving income withdrawals and or a scheme pension	<input type="checkbox"/> Yes <i>please give details below</i> <input type="checkbox"/> No						
	<table border="1"> <tr> <td><i>Name of scheme</i></td> <td><i>Annual gross premium £</i></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </table>	<i>Name of scheme</i>	<i>Annual gross premium £</i>				
	<i>Name of scheme</i>	<i>Annual gross premium £</i>					
Since 6 April 2006, I have taken income withdrawal and or a scheme pension	<input type="checkbox"/> Yes <i>please give details below</i> <input type="checkbox"/> No						
	<table border="1"> <tr> <td><i>Name of scheme</i></td> <td><i>Percentage of Lifetime Allowance used</i></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </table>	<i>Name of scheme</i>	<i>Percentage of Lifetime Allowance used</i>				
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**Please note**

Where applicable, if the scheme member is affected by Lifetime Limits, please answer the three questions below:

Protection against Finance Act 2006 limits

Primary  Enhanced

Surplus over Lifetime Allowance to be paid as

Lump sum  Income  Combination

If combination, the split to be applied

Lump sum £ \_\_\_\_\_ £ \_\_\_\_\_

## Tax code

**Important**

Please provide details of your current tax code with this form. If we don't receive this information, any payments will be subject to emergency tax coding.

## Member's signature

**Sign and date here**

Signature \_\_\_\_\_

Date \_\_\_\_\_