EMBARK PENSIONS

LUMP SUM ALLOWANCES INFORMATION

This form must be completed and emailed in BLOCK CAPITALS and BLACK INK and emailed to drawdown@embarkpensions.co.uk. when you submit a retirement options form for drawdown or an Uncrystallised Funds Pension Lump Sum (UFPLS). In the subject of the email please put your last name and account number.

If your client intends to apply for a Transitional Tax-Free Amount Certificate, please do not submit this Retirement Options Form. Instead please contact us on **0344 544 0566** and we will talk you through what you need to do. The Transitional Tax-Free Amount Certificate must be applied for before the first Relevant Benefit Crystallisation Event (RBCE). If you have a Transitional Tax-Free Amount Certificate please include a copy of it with this form.

We strongly recommend that you encrypt your email to protect the contents and your personal information. If you are using a password to protect your request, please remember to contact us separately with the password used. Alternatively, please post to: Embark Pensions, Provincial House, 37 New Walk, Leicester, LE1 6TU.

We will contact for further details if necessary.

Client Name:

Account Number:

1 LIFETIME ALLOWANCE USED BEFORE 6TH APRIL 2024

Lifetime Allowance (LTA) used elsewhere before 6th April 2024: **%**

2 LUMP SUM ALLOWANCE

Lump Sum Allowance (LSA) used elsewhere on or after 6th April 2024: **£**

3 LUMP SUM DEATH BENEFIT ALLOWANCE

Lump Sum Death Benefit Allowance (LSDBA) used elsewhere on or after 6th April 2024: **£**

4 ENHANCED PROTECTION

If you have Enhanced Protection please complete this section.

Value of all uncrystallised pension rights at 5th April 2023: **£**

Value of all uncrystallised pension rights at 5th April 2024: **£**

5 DECLARATION

I declare that to the best of my knowledge and belief the information contained in this form is true and complete and that based on the information provided, Embark Pensions will reasonably expect to treat this as up-to-date information on my other pension arrangements.

Signature (Member):

Print Name:

Date: D D M M Y Y

6 PRE-COMMENCEMENT PENSIONS

Where a pre-commencement pension, that started before 6 April 2006, has already been tested at the first BCE event after 6 April 2006 and before 6 April 2024 then it will be included in the amount of LTA already used when an individual takes their first LSA after 6 April 2024.

If an individual has no BCEs between 6 April 2006 and 6 April 2024 then the pre-commencement pension triggers a notional Relevant Benefit Crystallisation Event immediately before the first Relevant Benefit Crystallisation Event, so will use up some of the individuals LSA and LSDBA.

Please call us if this applies to you.

embark pensions

0344 544 0566

customerservices@embarkpensions.co.uk

Embark Pensions, Provincial House,
37 New Walk, Leicester, LE1 6TU

embarkpensions.co.uk

EBS Pensions Limited act as operator for the Option SIPP, Full SIPP, Liberty SIPP, EBS SIPP and EBS SAPPP. Embark Services Limited act as operator for the Hornbuckle Mitchell SIPP, Hornbuckle Mitchell Private Pension, Hornbuckle Mitchell FIPP, The Private Pension and the Freedom SIPP.

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