

## OPTION SIPP AND FULL SIPP PHASED FAD CONTINUATION DECLARATION

Please complete this form in BLOCK CAPITALS and black ink and return it to: Embark Pensions, Dunscair House, Deakins Business Park, Egerton, Bolton BL7 9RP. If you need assistance in completing this form, please call our Customer Services team on 01204 803500.

This form is to be completed in order to continue with the current phased Flexi-Access Drawdown you are receiving. Please ensure this form is completed within the appropriate time frame to ensure no delays.

Please note, there are charges for taking benefits from your SIPP. These are available on our website.

### 1 MEMBER DETAILS

Title: \_\_\_\_\_

Forename(s): \_\_\_\_\_

Surname: \_\_\_\_\_

Date of Birth: | D | D | M | M | Y | Y | Y | Y | National Insurance Number: \_\_\_\_\_

Ref: \_\_\_\_\_

Email Address: \_\_\_\_\_

### 2 PHASED FLEXI-ACCESS DRAWDOWN CONTINUATION

Phased Flexi-Access Drawdown is an option where you can take monthly income that has an element of Pension Commencement Lump Sum and an element of Flexi-Access Drawdown. We will crystallise funds for the year and pay out the Pension Commencement Lump Sum in 12 monthly instalments. You can also take monthly Flexi-Access Drawdown income alongside the Pension Commencement Lump Sum.

Please tick to confirm that you would like to continue with the current phased flexi-access withdrawal amounts:

If you require a change in your phased flexi-access withdrawal amounts, please complete the below:

New monthly target amount: £ \_\_\_\_\_

How much of this target amount will be made up of:

PCLS: £ \_\_\_\_\_

Drawdown (taxable income): £ \_\_\_\_\_

**Please Note:** Embark Pensions will have to crystallise enough pension to reach the PCLS target.

**3 FINANCIAL ADVISER CONFIRMATION**

**LTA Confirmation**

Has the client used up any of their LTA in the last 12 months as a member of another pension scheme?  Yes  No

If yes, please confirm LTA used from other pension schemes in the last 12 months.

Name of scheme/Pension Provider:

Percentage of LTA used in last 12 months:

**IFA Declaration**

By signing below, I confirm that the client is still receiving financial advice and I have provided the customer with the relevant risk warnings attached to this transaction.

Adviser Name:

Adviser Company:


FCA Registration Number:


Adviser Signature: 

Date:


| D | D | M | M | Y | Y |



 01204 803500

 Dunscar House, Deakins Business Park, Egerton, Bolton BL7 9RP

 [customerservices@embarkpensions.co.uk](mailto:customerservices@embarkpensions.co.uk)

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