



The Forthplus SIPP
Taking Your Pension

IMPORTANT NOTICES: Taking pension benefits will have a serious impact on your retirement planning and may have other impacts on your finances, so you should always seek professional financial advice before proceeding. You are also entitled to free, impartial guidance on your options from the Government-backed Pension Wise service. You can access this online at www.pensionwise.gov.uk, over the telephone from The Pensions Advisory Service or face-to-face through the Citizens Advice Bureau. To book a telephone or face-to-face meeting, call Pension Wise on 0800 138 3944. This is not a substitute for full, regulated financial advice.

1 MEMBER INFORMATION

Full Name:

Forthplus SIPP Reference:

2 LIFETIME ALLOWANCE INFORMATION

I. Lifetime Allowance Protection

Please detail any lifetime allowance protection you have with HMRC if applicable:

Not applicable:

Type:

Certificate Reference:

(Please enclose a copy of this certificate with the form)

II. QROPS Transfers

Please list any transfers made to QROPS on or after 6th April 2006.

Not applicable:

Pension Scheme	Value of Transfer	Date of Transfer	% of Lifetime Allowance Used

III. Pensions Started before 6th April 2006

Please list all pensions which were started before 6th April 2006.

Not applicable:

Pension Scheme	Value of Transfer	% of Lifetime Allowance Used

IV. Pensions Started after 6th April 2006

Please list all pensions where you elected to start taking benefits on or after 6th April 2006.

Not applicable:

Pension Scheme	Value of Transfer	Date of Transfer	% of Lifetime Allowance Used

If you need to add additional information please reprint this page and provide with your form.

3 TYPE OF BENEFIT PAYMENT

Pension Drawdown

3.1 Amount of Pension to Crystallise: Full Pension OR % OR Amount

3.2 PCLS Amount (up to 25%)
Please ensure section 3.1 is completed: Maximum Allowed OR % OR Amount

Pension Income

3.3 Amount of Income to Take (Gross): None OR Amount Per Payment

3.4 Regularity of Income: One Off OR Monthly OR Annually

Date of First Income Payment: DD / MM / YYYY

Uncrystallised Funds Pension Lump Sum (UFPLS)

Amount or Percentage of Uncrystallised Pension to be Paid (Before Tax)

Full Pension

OR

Specific Amount

Please note: One Off payments are made on or around either 14th/28th of the month and regular payments are paid on or around 28th of the month, subject to funds being available in good time.

