

Sippchoice Bespoke SIPP

Drawdown Request Form (from 1 October 2018)

This form should be completed if:

- you would like to start taking drawdown from the Sippchoice Bespoke SIPP; or
- you have already taken some drawdown from part of your fund under the Sippchoice Bespoke SIPP and you would now like to take additional benefits from the rest of your fund.

When completed, please return this form to us at: Dentons Pension Management Limited, Sutton House, Weyside Park, Catteshall Lane, Godalming GU7 1XE.

We strongly recommend that you:

1. **obtain financial advice that is specific to your personal circumstances before you proceed with drawdown; and**
2. **review your death benefit nomination and if you would like to amend your nomination then please complete the Death Benefit Nomination Form which is contained in the Appendix and return it to us.**

A Member's Details

1. Name	
2. National Insurance number	
3. SIPP membership number (if known)	

B Benefit Details

Please complete this section only if you are 55 or over (or earlier in cases of serious ill-health or if you have a protected pension age). You can take a tax-free lump sum (up to a maximum amount) in addition to taxable one-off and/or ongoing income payments with no maximum (subject to there being sufficient funds available in your pension fund), unless you are in 'capped drawdown'.

How much of your pension fund do you now want to use to provide drawdown?	the whole of my pension fund: <input type="checkbox"/> (please tick if appropriate) OR amount to be used to provide drawdown: £ <input type="text"/> (please enter amount if appropriate)
Amount of tax-free lump sum required	maximum: <input type="checkbox"/> (please tick if appropriate) OR other amount: £ <input type="text"/> (please enter amount if appropriate) OR nil: <input type="checkbox"/> (please tick if appropriate) <i>Note: There could be tax charges if you take a tax-free lump sum with the intention of using it to fund additional pension contributions (so-called 'recycling').</i>

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C Bank Account Details

Your bank account details (benefit payments will be paid directly into this account):

Bank name	
Bank branch	
Account name	
Sort code	
Account number	

D Guidance and advice

Have you received advice from a financial adviser recommending that you proceed with drawdown as per this drawdown request?	Yes <input type="checkbox"/> No <input type="checkbox"/> (tick as appropriate) If 'No', please proceed to Section H below. If 'Yes', please arrange for your financial adviser to complete the following declaration and then proceed to Section I.
	I confirm that I have advised the member to proceed with drawdown as per this drawdown request
Financial adviser's signature	
Financial adviser's name (in capitals)	
Financial adviser's FCA reference number	
Date	

E Member's Request

I confirm that : (a) the information provided above is correct; and (b) I hereby request Sippchoice Trustees Limited to make the lump sum and income payments (after deduction of income tax, where applicable) described above from my SIPP bank account. I understand that it is my responsibility to ensure that there are sufficient funds for this purpose in that bank account and that the payments will not be made unless there are sufficient funds available.	
Name in capitals:	
Signature:	
Date:	

Appendix

Death Benefit Nomination Form (from 27 April 2018)

If you would like to nominate, or change a previous nomination of, the beneficiary(ies) who you would like to receive any benefits that may become payable under the Sippchoice Bespoke SIPP in the event of your death then please complete this form and return it to us at:

Dentons Pension Management Limited, Sutton House, Weyside Park, Catteshall Lane, Godalming GU7 1XE.

You may nominate more than one beneficiary and you may change your nomination in writing at any time. Your nomination is not binding and, although Dentons Pension Management Limited will have regard to your nomination, it has discretion over to whom any death benefits are paid and is not required to follow your wishes.

A Individuals

Please provide details of any individuals who should be considered as a beneficiary.

1. Name	
Address	
	Postcode:
Relationship to you	
Percentage of total	
2. Name	
Address	
	Postcode:
Relationship to you	
Percentage of total	
3. Name	
Address	
	Postcode:
Relationship to you	
Percentage of total	

B Trusts

Please provide details of any trusts which should be considered as a beneficiary.

Name of trust	
Names of trustees	
Address of trust	
	Postcode:
Percentage of total	

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C Charities

Please provide details of any charities that should be considered as a beneficiary.

Name of charity	
Address of charity	
	Postcode:
Percentage of total	

D Member's Signature

This replaces any previous nomination(s) that I have made.

Member's name	
SIPP membership number (if known)	
Signature	
Date	

Notes

1. Death benefits can be paid as a lump sum to your beneficiaries. As an alternative to a lump sum, benefits can be paid as income to:
 - your dependants; and/or
 - any individual who is not a dependant and has been nominated by you on this form.
2. Please note that where a charity has been nominated it is not possible for a subsequent beneficiary to nominate a different charity.
3. Further information on death benefits can be found in our Key Features Document which is available via our website.
4. Please make sure that the percentages add up to 100%.
5. Please use an additional sheet of paper if you would like to nominate more beneficiaries than can be accommodated on this form.

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The Sippchoice Bespoke SIPP has been registered with HM Revenue & Customs under the Pension Scheme Tax Reference 00738995RG. Dentons Pension Management Limited is the Provider and Scheme Administrator of the Sippchoice Bespoke SIPP and it is authorised and regulated by the Financial Conduct Authority under reference number 461094. Sippchoice Trustees Limited is the Trustee of the Sippchoice Bespoke SIPP.

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