

Transact Pension Benefit Request

Adviser Notes

Please complete this form if you wish to take benefits from your Transact Personal Pension, Transact Executive Pension or Transact Section 32 Buy Out Bond. Should you require any assistance in completing this form, please consult your Financial Adviser or one of our Client Services Managers on (020) 7608 4900.

1 Investor Details

Transact Portfolio Name

Transact Portfolio Number (if known)
 - -

Are you entitled to an enhanced Lifetime Allowance (have you applied for Enhanced Protection/Primary Protection or both)? Yes No
(If 'Yes', please provide a copy of your HMRC certificate.)

2 Benefit Options

From which Pension do you wish to take benefits?
 Where you wish to take benefits from more than one pension, please use a separate form.

Transact Personal Pension	Transact Executive Pension	Transact Section 32 Buy Out Bond
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please indicate below which option you require

	Non-Protected Rights	Safeguarded Rights (Age Over 60 and Personal Pension Only)	Protected Rights (Personal Pension Only)
1. Secured Pension	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Unsecured Pension (Previously Income Drawdown)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Phased Retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Alternatively Secured Pension	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For options 2, 3 and 4, please specify the level of income you wish to receive.
(Please ensure your selected income is between the limits specified by the Government Actuary Department and as appears in your Personalised Illustration.)

Pension Type	Income Required £	Lump Sum Required £	Frequency (M, Q, H, Y)	Day (7th, 17th, or 27th)	Start Month	GAD* %
Personal Pension Protected Rights						
Personal Pension Non-Protected Rights						
Personal Pension Safeguarded Rights						
Executive Pension/ Section 32 Buy Out Bond* <i>(* Please delete as appropriate)</i>						
Phased Retirement (Personal Pension/ Executive Pension/Section 32*) <i>(* Please delete as appropriate)</i>						

* Please enter 120% if the maximum GAD amount is required under Unsecured Pension (or 90% for Alternatively Secured Pension), 0% if minimum GAD is required under Unsecured Pension (or 55% for Alternatively Secured Pension), or any % between.



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2 Benefit Options (continued)

Where you have selected Benefit Option 2, 3 or 4, please indicate to where you wish your benefits to be paid.

Your Transact General Investment Account

Your Nominated Account

Another Account (please specify below)

Bank/Building Society

Address

Country

Postcode

Account Number

Account Name

Branch Sort Code

3 Details of Benefits Previously Taken

Have you received benefits from any Registered Pension Scheme prior to 6th April 2006?*

Yes

No

If 'Yes', please supply the following information.

Pre A-Day Max GAD 1

£

Pre A-Day Max GAD 2

£

Pre A-Day Max GAD 3

£

Annuity/Scheme Pension 1

£

Annuity/Scheme Pension 2

£

Annuity/Scheme Pension 3

£

Please use a separate sheet if more space is required.

* If this is the first Benefit Crystallisation Event since 6th April 2006, please enter the current amount; if not, please provide the amount as at the first Benefit Crystallisation Event.

Have you received benefits from any Registered Pension Scheme after 6th April 2006?

Yes

No

If 'Yes', please provide details of how much of your Lifetime Allowance was used. These details must be the latest statements issued by the Trustee/Administrator of the Registered Pension Scheme from which you have taken benefits.



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4 Authorisation

- I hereby authorise Integrated Financial Arrangements plc and IntegraLife UK Limited to make payments in accordance with the above instructions.
- I declare that the answers to the questions above are true to the best of my knowledge and belief and that failure to provide accurate information could result in fines and additional tax charges.
- I declare that the lump sum payment will not be re-invested back into a Registered Pension Scheme beyond the limits imposed by HMRC from time to time, and should I decide to make such re-investment I will provide full details to the Scheme Administrator.

Signature

X

Date

/ /

5 Guidance

Are you in receipt of pre 6th April 2006 benefits? If so:

- If this is your first Benefit Crystallisation Event under any scheme, your available Lifetime Allowance at that Benefit Crystallisation will be reduced to reflect the level of pre-commencement pension at that time.
- If this is not the first Benefit Crystallisation Event under any scheme, account will still need to be taken of the reduction to the available Lifetime Allowance that occurred in relation to any such Crystallisation Event due to any pre-commencement pension in payment at that time (this will not necessarily be reflected in the statement provided by the scheme where that first Benefit Crystallisation Event occurred).

6 Adviser Checklist

Ensure the following documents are included:

- **Transact Pension Benefit Request** (this form) in all cases
- **Copy of Lifetime Allowance certificate**, if applicable
- **Details of Lifetime allowance used after 6th April 2006**, if applicable
- **Additional T020 forms**, if applicable

The **Scheme Administrator and Trustee** of the Transact Personal Pension and Transact Executive Pension is Integrated Financial Arrangements plc
Registered Number: 3727592 in England

The **Policy Administrator** of the Transact Section 32 Buy Out Bond is Integrated Financial Arrangements plc
Registered Number: 3727592 in England

The **Provider** of the Transact Personal Pension, Transact Executive Pension and Transact Section 32 Buy Out Bond is IntegraLife UK Limited
Registered Number: 798365 in England

Registered Offices: Domain House, 5-7 Singer Street, London EC2A 4BQ.

Tel: (020) 7608 4900

Fax: (020) 7608 5300

Email: info@Transact-Online.co.uk

Website: www.Transact-Online.co.uk

Integrated Financial Arrangements plc and IntegraLife UK Limited are both authorised and regulated by the Financial Services Authority.

