

Please complete this form if you wish to take benefits from your Transact SIPP. 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.

Adviser Notes

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)?
(If 'Yes', please provide a copy of your HMRC certificate.)

Yes No

2 Benefit Options

Please indicate below which option you require

	Non-Protected Rights	Safeguarded Rights (Age Over 60)	Protected Rights
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* %
Protected Rights						
Non-Protected Rights						
Safeguarded Rights						

* 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.

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



Transact SIPP Benefit Request

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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 6th April 2006 Max GAD 1 £

Pre 6th April 2006 Max GAD 2 £

Pre 6th April 2006 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.

4 Authorisation

- I hereby authorise Integrated Financial Arrangements plc 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).

