



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:

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.

Pension Scheme	Value of Transfer	Date of Transfer	% of Lifetime Allowance Used
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

III. Pensions Started before 6th April 2006

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

Pension Scheme	Value of Transfer	% of Lifetime Allowance Used
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

IV. Pensions Started after 6th April 2006

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

Pension Scheme	Value of Transfer	Date of Transfer	% of Lifetime Allowance Used
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3 TYPE OF BENEFIT PAYMENT

Flexible Pension

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

PCLS Amount (up to 25%): Maximum Allowed OR % OR Amount

Amount of Income to Take: None OR Amount Per Payment

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

OR

