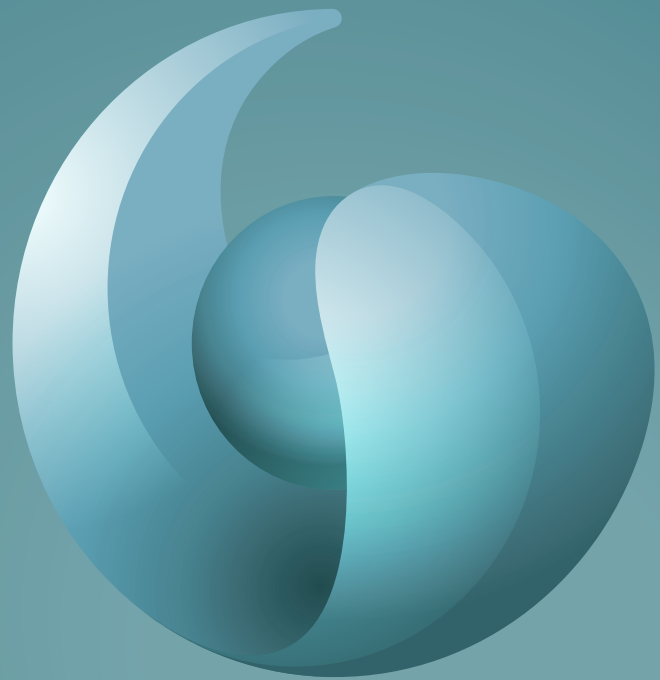


# The SSAS

Benefits Form



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Please complete all sections of the form

## 1. Member Details

Surname	Forenames (in full)
Date of Birth	National Insurance Number
Permanent Residential Address	Scheme Name
	Tax Residence
	Tax Reference

Please provide your P45 (if applicable) as it will be required by HMRC. If no P45 has been received all gross funds will be taxed under the basic rate tax code until subsequent notifications have been received from HMRC.

## 2. Pension Requirements

Date retirement benefits to commence (DD/MM/YYYY): \_\_\_\_\_

Type of Pension:	<input type="checkbox"/> Capped Drawdown Pension	<input type="checkbox"/> Flexi-Access Drawdown Pension
Required Tax Free Lump Sum:	£ <input type="text"/>	OR <input type="checkbox"/> Maximum
Required Gross Annual Pension:	£ <input type="text"/>	OR <input type="checkbox"/> Maximum
Required pension frequency: <i>(monthly payments are made on or around the 15th each month)</i>	<input type="checkbox"/> Monthly	<input type="checkbox"/> Annually

## 3. Bank Details

Please give details of your personal bank account which you would like your pension to be paid into:

Name of Bank/Building Society	Account Number
Account Name	Bank Branch Address
Sort Code	

## 4. Benefits Already in Drawdown

### Pre 5th April 2006 Benefits

Before 5 April 2006, were you taking any benefits, including income withdrawal or a pension scheme, from any UK approved pension scheme? If yes, please provide details (if more than one please continue on a separate sheet):

Name of Pension Scheme	Scheme Administrator
Type of Pension Scheme	Current maximum rate of income £

### Post 5th April 2006 Benefits

Have you taken any benefits from any UK registered pension scheme since 5 April 2006? In yes, please provide details (if there is more than one please continue on a separate sheet):

Name of Pension Scheme	Scheme Administrator
Type of Pension Scheme	Amount of LTA used

If you, at the time of your first BCE (detailed above), were already taking benefits from pension schemes that had come into payment before 6 April 2006, how much of your Lifetime Allowance did the Scheme Administrator calculate had been utilised by such benefits?

 %

## 5. Protection

Do you have protection from the Lifetime Allowance?

Yes

No

*If yes, please provide a copy of your HMRC certificate to support your declaration.*

If you have enhanced or primary protection with lump sum rights over £375,000 on 5 April 2006, and have taken benefits since that date, please provide details below:

Name of Pension Scheme	Scheme Administrator
Date of Benefit Crystallisation Event	Amount of Pension Commencement Lump Sum Paid £

## 6. Lifetime Allowance Excess

If payment of your benefits from The SSAS means that you will have exceeded the Lifetime Allowance, you will need to specify how you would like to receive the excess:

Use to provide future pension benefits (subject to current tax regulations at a 25% tax charge)

Use to provide a lump sum (subject to current tax regulations at a 55% tax charge)

## 7. Member Declaration

- I understand that on the basis of this application and the value of my Fund, iPensions Group will calculate the tax free cash and pension available to me and inform me accordingly. A fee for the calculation will be charged to my Fund irrespective of whether I take the benefits or not.
- I understand that if I take a Pension Commencement Lump Sum as the means to increase contributions significantly to any UK Registered Pension Scheme it will be treated as recycling by HMRC and a tax charge will be payable and so I hereby declare that this is not my intention.
- I hereby give you authority to check with HMRC the details of any certificates which I supply in order to support any protection from the Lifetime Allowance.
- I understand that it is my sole responsibility to declare any benefits I may receive from the Scheme, in the country where I am tax resident. I hereby give iPensions Group a full and unconditional indemnity for any tax liability, interest or charges which may occur as a result of any false or incorrect declaration I have made that ultimately results in such a liability being imposed by any tax authority in any country. I also confirm that should my tax residency change, I shall notify you accordingly.
- I enclose my P45 (if applicable) to be sent to HMRC upon commencement of benefits.
- I understand that it is my responsibility for ensuring that there are sufficient cleared cash funds available in your account to pay the pension.

Member's Signature

Member's Name

Date

## 8. Adviser Declaration

- I confirm that I have provided advice to the member named above in accordance with the instructions contained in this form.

Adviser's Firm

Adviser's Signature

Adviser's Name

Date