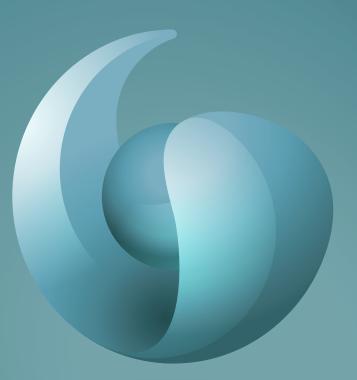


The SSAS

Uncrystallised Funds Pension Lump Sum (UFPLS) Benefits Form



🕺 www.ipensionsgroup.com



ssas@ipensionsgroup.com

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Please complete all sections fully.

Section 1: Member Details	
Surname	Forenames (in full)
Permanent Residential Address	Date of Birth (DD/MM/YYYY)
	National Insurance Number
	Scheme Name

Section 2: 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
Bank Branch Address	Sort Code
	Account Name

Section 3: Taking UFPLS

Please complete one box below to indicate the amount, or percentage of your fund, you wish to take benefits from. This amount must be the total gross amount to be applied to provide a UFPLS.

All of my uncrystallised fund	
f	of my uncrystallised fund
%	of my uncrystallised fund
Date UFPLS to be taken (DD/MM/YYYY)	



Section 4: Member's Declaration

- The information contained in this form is correct, complete and not misleading to the best of my knowledge and belief.
- I have unused lifetime allowance available that is more than the value of the benefits being withdrawn from The SSAS.
- I do not have any transitional protection or lifetime allowance enhancement factor that means I am entitled to less than 25% of the funds crystallised tax-free
- I agree that I will indemnify the scheme administrator against any liability to pay any tax or other charges which arise out of the provision of false or misleading information.
- I understand the risks associated with taking benefits as set out in The SSAS Risk Warning Questionnaire.
- 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

Section 5: Adviser's Declaration (to be completed where advice has been given)

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

Adviser's Signature	Adviser's Name
	Adviser's Firm
Date	