

Our SIPP New Business Illustration Request

In order to help you meet the UK regulatory requirements to provide your client with a specific new business illustration for our SIPP, please complete this form as fully as possible and email to: illustrations@optionspensions.co.uk

The security and safety of your data and your client's data is very important to us. A copy of our privacy notice is available on our website www.optionspensions.co.uk/privacy

If you have any questions, or need to discuss specific client requirements please give our Illustrations Team a call on 0330 124 1505.

Financial Adviser Details

Financial adviser name	<input type="text"/>
Financial adviser company name	<input type="text"/>
Email address	<input type="text"/>
Telephone number	<input type="text"/>

Client Details

Title	<input type="text"/>
First name	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text"/>
Intended retirement age	<input type="text"/>
Gender	<input type="button" value="Male"/> <input type="button" value="Female"/>
Marital status	<input type="button" value="Single"/> <input type="button" value="Married"/> <input type="button" value="Civil Partnership"/>
Spouse date of birth (if applicable)	<input type="text"/>
Residency status	<input type="button" value="Rest of UK"/> <input type="button" value="Scotland"/> <input type="button" value="Wales"/>
Gross salary	£ <input type="text"/>
Income tax rate	<input type="text"/> %
Do you have pension protection	<input type="button" value="Yes"/> <input type="button" value="No"/>

If yes, please confirm type of pension protection in place (please tick one)

<input type="button" value="Primary"/>	<input type="button" value="Enhanced"/>	<input type="button" value="Fixed 2012"/>	<input type="button" value="Fixed 2014"/>
<input type="button" value="Fixed 2016"/>	<input type="button" value="Individual 2014"/>	<input type="button" value="Individual 2016"/>	

Our SIPP Product Fees (please tick one)

<input type="button" value="Your Simple SIPP"/>	<input type="button" value="Your Premier SIPP"/>
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Transfer details

Name of transferring plan (optional)

Estimated transfer value £

Is the transfer in drawdown?

Name of transferring plan (optional)

Estimated transfer value £

Is the transfer in drawdown?

In-specie transfer details

Please provide a full schedule of assets you wish to transfer in-specie. We will only accept a transfer of assets (in-specie) which are allowable within our SIPP.

ISIN/SEDOL	Investment provider	Number of Units

If you need to include more transfer details, please provide them by email with this form to our Illustrations Team at illustrations@optionspensions.co.uk

Contribution details (if applicable)

Regular Contribution

Personal/employee/third party £ (net)

Frequency

Employer £ (gross)

Frequency

Single Contribution

Personal/employee/third party £ (net)

Employer £ (gross)

Drawdown details (if applicable)

Tax free cash	<input type="button" value="Maximum available"/> <input type="text" value="Specified amount (please state)"/> £
Income	<input type="text" value="Specified amount (please state)"/> £ (gross) <input type="button" value="Entire fund"/> <input type="button" value="Nil amount"/>
Frequency of income payments	<input type="button" value="Monthly"/> <input type="button" value="Quarterly"/> <input type="button" value="Half yearly"/> <input type="button" value="Annually"/> <input type="button" value="One-off payment"/>

Uncrystallised funds pension lump sum (if applicable)

Please state the lump sum requirement from the uncrystallised part of your client's pension fund.

or
 £

Investments

Investment type	Investment provider	Amount or % to be invested	Assumed AMC

Financial Adviser Fees

Initial Fees

and/or %

For drawdown illustrations only:

Is this initial fee to be calculated before of after tax-free cash

Annual Fees

and/or %

Once completed please email a copy of this form to illustrations@optionspensions.co.uk



FOR MORE INFORMATION PLEASE CONTACT

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