




WHITEHALL

whitehallgroup.co.uk

SIPP Retirement Income Amendment Form

1. Notes

1. **For amending existing retirement income from crystallised funds. This form should be completed and signed by the beneficiary and financial adviser where applicable.**
2. If you have any questions about the completion of this form, please contact us at sipp@whitehallgroup.co.uk or telephone 03302 232300.
3. Please return the completed form to us at our address below. Email copies are accepted.
4. Accessing your pension savings is an important decision and we strongly recommend that you seek advice on the options available and which option is best for you.
5. Please note that neither Whitehall Group SIPP Limited nor Whitehall SIPP Trustees Limited give financial advice and nothing in this questionnaire should be considered as financial advice. We strongly suggest that you seek advice from an Independent Financial Adviser (IFA) before making any decisions regarding your retirement benefits. If you do not already have a Financial Adviser, information can be obtained from www.unbiased.co.uk or telephone 0800 085 3250.
6. To assist those who do not take financial advice, the Government has set up the Pension Wise service to give you free, impartial guidance on your options. Pension Wise provides assistance and details of the options available to you in respect of accessing your pension savings. You can book an appointment online at www.moneyhelper.org.uk or over the telephone on 0800 138 3944, or face to face through the Citizens Advice Bureau.
7. Although Pension Wise can help you understand your options, it cannot provide advice on which option is best for you and is not intended to replace full regulated financial advice.

2. Your Details

Title (Mr/Mrs/Miss/Ms/Dr)	<input type="text"/>	
Forename(s)	<input type="text"/>	
Surname	<input type="text"/>	
SIPP Number	<input type="text"/>	
Date of Birth	<input type="text"/>	
National Insurance Number	<input type="text"/>	
Email address	<input type="text"/>	
Telephone Number	<input type="text"/>	
Residency for tax purposes	<input type="text"/>	Note: Please specify the country

3. Your Amended Income Requirements

Amount of Annual Pension	<input type="text"/>	Note: If income tax is payable, this will be deducted from payments made to you and you will receive the balance.
Frequency	One-off <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual <input type="checkbox"/>	Note: if we receive your request after the 10 th of the month, we will process this in the following month.
If Capped Drawdown:		
Maximum Permitted?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Cancel Your Pension Income?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Date of Amended Income	<input type="text"/>	

4. Funding Your Income

Do any existing investments need to be sold to fund your amended income requirements?

Yes No

If Yes, please give details

Note: completion of this form gives your instruction for this/these investments to be sold.

5. Payment Details

Bank or Building Society	<input type="text"/>	Note: Please also provide a copy of a recent statement for this account if it is different from the account details we already hold for you.
Branch Address	<input type="text"/>	
	<input type="text"/>	
Post Code	<input type="text"/>	
Sort Code	<input type="text"/>	
Account Name	<input type="text"/>	
Account Number	<input type="text"/>	

6. Declarations

1. I request and consent to the payment of the benefits set out in this form. I understand and agree to the following.
2. I confirm that I am the SIPP member named in Section 2 and that I have answered the questions on this form truthfully.

3. I understand that I will be able to change the amount of income within the limits set down by the Rules of the Scheme and at the frequency permitted by HMRC. I will give you at least ten working days' notice if I wish to do this.
4. It is my responsibility to ensure there is sufficient cash in the pension scheme bank account to pay my selected benefits. I will be responsible for informing the scheme Trustees how these monies are to be made available. You will not be responsible for the payment of benefits where there is insufficient cash available.
5. I authorise you to sell the investment(s) specified above to provide sufficient funds to pay my pension income.
6. My pension is not guaranteed and there are risks involved which mean my pension may reduce over time. The benefits payable from the pension plan on my death are not guaranteed.
7. I consent to Whitehall SIPP Trustees Limited using a pooled trustee bank account for the purposes of paying my pension. I agree to Whitehall SIPP Trustees Limited being sole signatory to this account and consent to them earning interest on funds held in the account pending payment to myself or HM Revenue & Customs.
8. I agree that I have not received any financial advice from Whitehall Group SIPP Limited or Whitehall SIPP Trustees Limited. My choice of requested benefits has been made with the help of my financial adviser, or I have made the choices myself.
9. I indemnify Whitehall Group SIPP Limited and Whitehall SIPP Trustees Limited against any costs, fines or penalties which may arise as a result of me giving you incorrect information.
10. I accept that if I receive income from a flexi-access drawdown arrangement, I will trigger the Money Purchase Annual Allowance, if I have not already done so.

7. Member Signature

Your Name

Your Signature

Date

8. Adviser's Declaration

I confirm that I have provided advice to the customer named above. I have given advice on the benefit withdrawals detailed above and the suitability of the investments to the customer and have recommend that they proceed. I have provided the customer with the relevant risk warnings applicable to this transaction.

Adviser's Name

Signature

Position

Senior Management
Functions held

Date

Please Return this form to:

Whitehall Group
8-10 Bolton Street
Ramsbottom
BLO 9HX

Contact Us:

Telephone: 03302 232300

Email: ssas@whitehallgroup.co.uk

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Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294), Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590), Whitehall Group SIPP Limited, a company registered in England and Wales (Registered number 13577749) and Whitehall SIPP Trustees Limited, a company registered in England and Wales (Registered number 13587700). All companies have their registered office at 8-10 Bolton Street, Ramsbottom, BLO 9HX.

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