

Interactive Investor SIPP Retirement Options Form

Name: Scheme Number:

Please take this form as my instruction to calculate and pay out benefits from my Interactive Investor SIPP based on the following:

Assets as at / / 20 (the asset value must be as at this chosen date)	Value £
SIPP Bank Account with RBS	
Investment with The Motley Fool Share Dealing Service	
Less SIPP fees	
Total Asset Value	

Type of Retirement: Capped Drawdown Flexible Drawdown Secured pension

Please complete all sections:

A. Pension Commencement Lump Sum (PCLM)

I wish to draw:

My maximum PCLS

or

A PCLS of £

Please advise if the PCLS is to be paid:

By BACS

By Same Day Payment (Bank charges will apply) (Please note payment cannot be made to a third party account)

To Bank:

Sort Code:

Account Number:

Account Name:

B. Income Drawdown

Following payment of the lump sum I wish to:

Start receiving Pension Payments or

Postpone Income Payments from my SIPP

I understand the Income Drawdown is reviewed every three years from the date of drawdown, up until my 75th birthday, or more frequently if requested. I understand there is a charge for these reviews.

If a pension is to be paid, I confirm if it is to be paid at a level of £ / Maximum level pa (please complete or delete where appropriate) on the following basis:

Monthly Annually

The pension income should be paid into the following bank account: (Please note payment cannot be made to a third party account)

To Bank:

Sort Code: Account Number:

Account Name:

The Interactive Investor SIPP is provided by The Lifetime SIPP Company, which is authorised and regulated by the Financial Conduct Authority (FCA) 464526. Registered address Vicarage Court, 160 Emin Street Swindon SN3 4NE. Registered Company Number 2455807. Interactive Investor Trading Ltd is authorised and regulated by the FCA and is a member of the London Stock Exchange. Registered Office: 1st Floor Standon House 21 Mansell Street London E1 8AA. Registered in England with Company Registration number 03699618.

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Please note that pensions are paid via Harley SAS Ltd Payroll. This will give rise to an annual charge.

All pensions are paid on the last working day of the month. To enable the start of my pension payments, I enclose a completed New Starter Checklist or a copy of my P45.

Please allow 10 working days from receipt of all documentation and funds for the first payment to commence.

C. Other Information Required

Please confirm the following:

i) National Insurance Number

ii) Address

Postcode

iii) Email Address

iv) Attach copies of any Lifetime Allowance Certificates for any other pension arrangement.

v) Attach details of any pensions in payment prior to 5th April 2006 and the maximum pension payable from these arrangements.

vi) Expression of wish.

HMRC Pension Protection

Please advise if you have registered for Protection with HMRC.

Enhanced Primary Fixed Individual Fixed 2014 None

Please provide a copy of the certificate with this completed form.

Declaration

I confirm that I have received appropriate financial advice from

and am aware of my options under the Interactive Investor SIPP. I wish to draw benefits from my Interactive Investor SIPP as selected above.

As part of this advice I have received an appropriate Key Features Illustration – Copy attached/Aries reference Number:

I acknowledge it is my responsibility to ensure there are sufficient funds available to pay any income, and that I am responsible for any disinvestment required.

I understand the SIPP fee for starting my pension benefits will be deducted from my Interactive Investor SIPP. I am also aware there is an additional charge for the pension payroll, should I decide to receive an income from the SIPP. I understand these fees will be settled from the SIPP bank account or, if there are insufficient cash deposits, I am required to make suitable arrangements for the fees to be settled as per my contract with The Motley Fool Share Dealing Service.

Signed:

Dated:

Please return the completed form to:

Interactive Investor SIPP, Interactive Investor, 1st Floor, 2 West Regent Street, Glasgow G2 1RW **Tel:** 0845 200 2779