

YOUR FUTURE SIPP

How to illustrate - non-drawdown

How to guide

Your future, our focus.

Before you begin

Imago

Imago is the tool we use to create all of our illustrations.

You can use Imago to create illustrations for those of your clients that are thinking about opening a SIPP at Curtis Banks, as well as those that already have one. This document describes how to create illustrations for new clients. The details that you enter on the illustration will pull through to the online Your Future SIPP application form.

Recording your client's details

You'll need to record details of your client on Imago before you can create the illustration.

Complex illustrations

Imago is a powerful system, with lots of options. If your client intends to transfer a mixture of non-drawdown and drawdown funds, our SIPP Support Team will create the illustrations for you.

Getting help

If you need any help creating your illustration, please contact one of the below teams:

For pre-sale queries:

T: 01473 296975

E: salessupport@suffolklife.co.uk

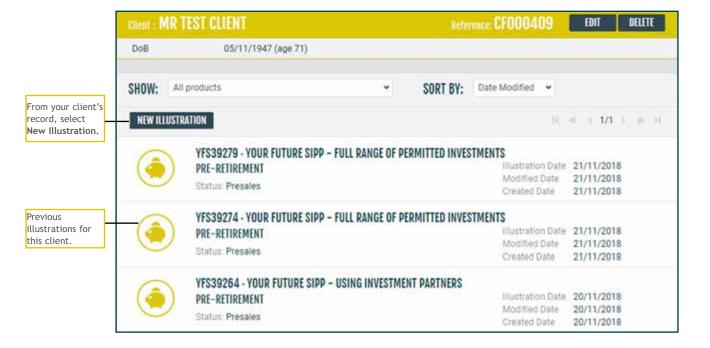
For post-sale queries:

T: 01473 296969

E: sippsupportteam@curtisbanks.co.uk

Starting your illustration

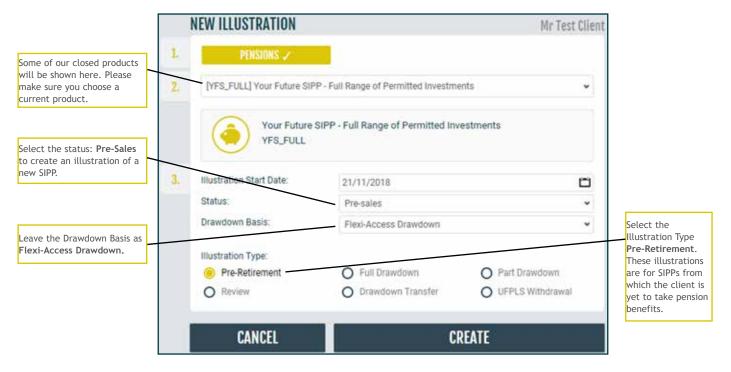
Create your illustration



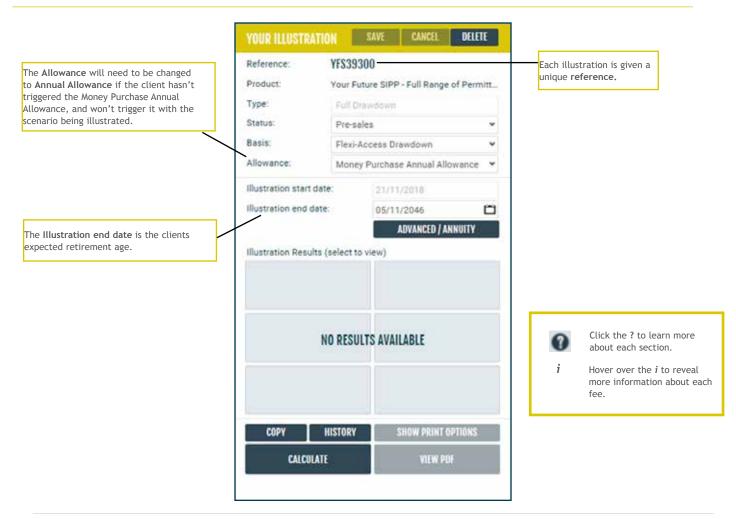
Create your illustration (continued)

For guidance on completing drawdown illustrations, please refer to our pre-sale drawdown guide.

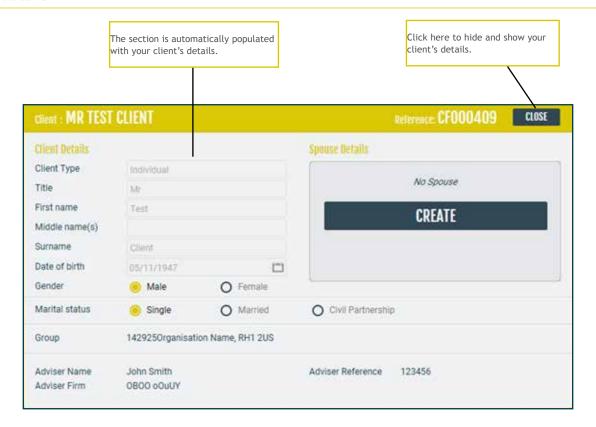
Choose one of our products.



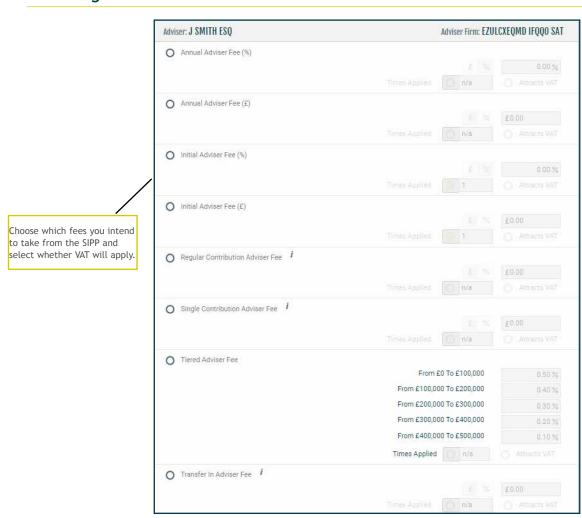
Initial view



Client details



Your charges



Product and investment manager charges

The charges shown match those for the chosen product, and the expected features of your client's SIPP.

Check that the fees apply to your client's circumstances.

If initial and ongoing external investment charges will apply to the plan, record these in this section.



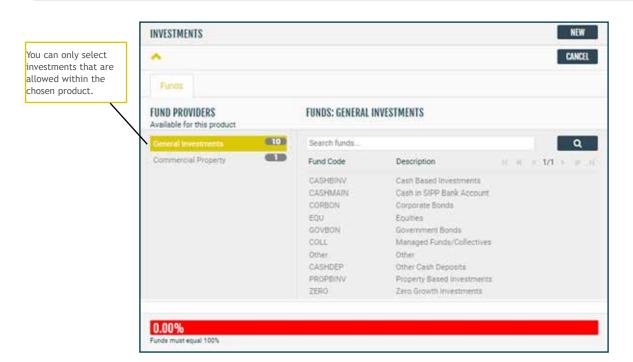
If initial and ongoing external investment charges will apply to the plan, record these below.



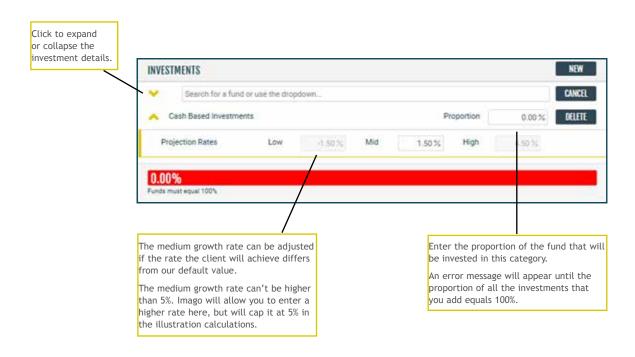
Investments

The rate of growth used by the illustration calculation is determined by the types of investment that your client intends to hold in their SIPP.

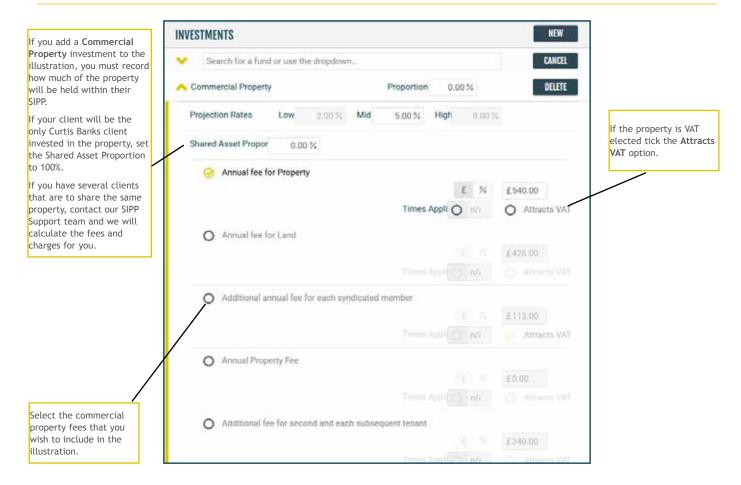




Investment details



Commercial property investment charges (for applicable product only)



Transfers and contributions

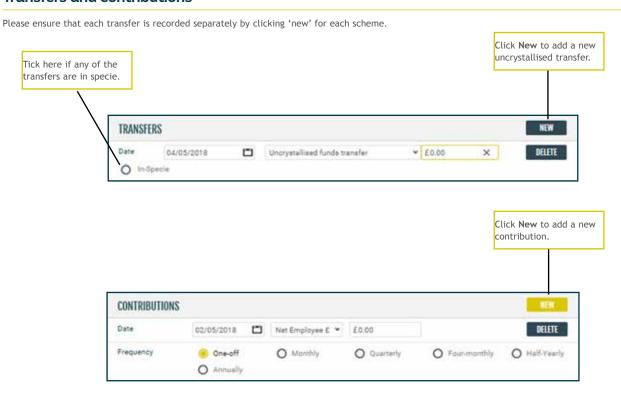


Illustration calculation and downloading the illustration

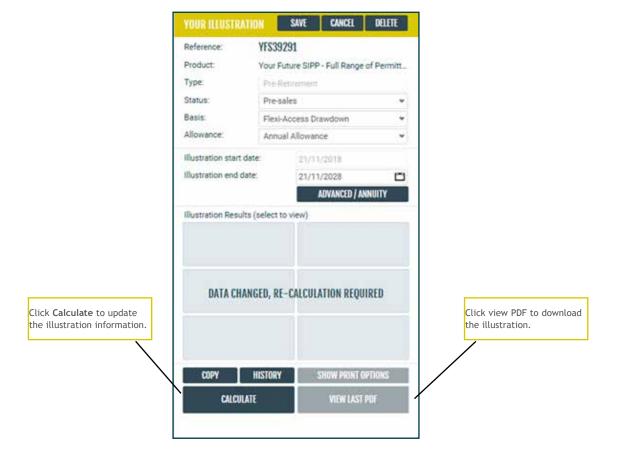
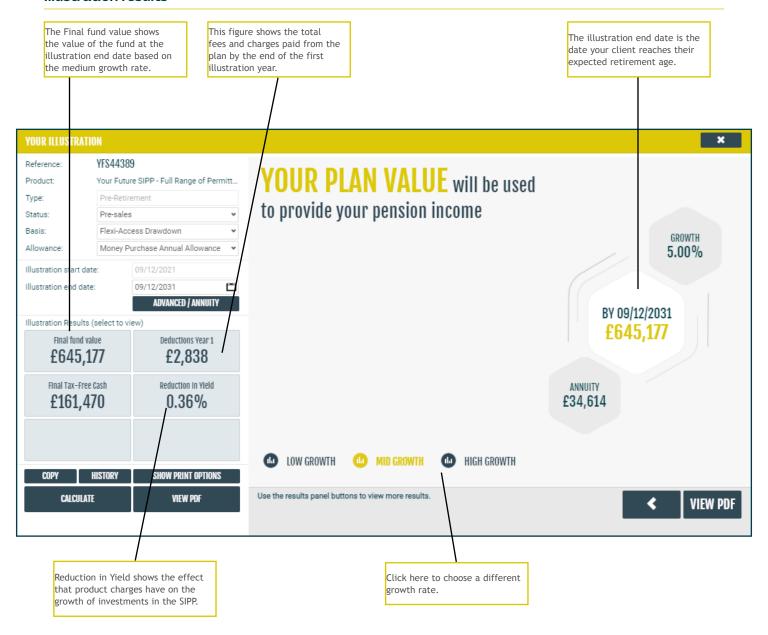


Illustration results



Next steps

Once you are happy with the illustration, please refer to our 'How to apply guide' which is available on our website for details on applying for Your Future SIPP.

Post-sale clients

Once you have applied for Your Future SIPP, you can create additional illustrations via our online portal. Please go to curtisbanks.co.uk and either register or log in to the the Your Future SIPP portal.

Notes

Notes

Curtis Banks Pensions, T 0370 414 7000 153 Princes Street, F 0370 414 8000 Ipswich, IP11QJ curtisbanks.co.uk

Call charges will vary. We may record and monitor calls.

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited.

Suffolk Life Pensions Limited is a company registered in England & Wales (registered number 1180742) and is authorised and regulated by the Financial Conduct Authority (number 116298). Suffolk Life Annuities Limited is a company registered in England & Wales (registered number 1011674) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (number 110468). The registered address of both companies is 153 Princes Street, Ipswich, Suffolk IP1 1QJ. SL174.202301 January 2023