

Illustration Request Form (Unadvised clients)

For Your Future SIPP only. Only complete the sections relevant to the application.

Please email your completed form to sippsupportteam@curtisbanks.co.uk.

1 Your details

Plan number

Title *Mr/Mrs/Miss/Ms/Dr/Other*

First Name

Middle name(s)

Surname

2 Illustration type

Pre-Retirement

Full Drawdown

Part Drawdown

Drawdown Transfer

UFPLS Withdrawal

Expected retirement age

Please note that any plans which have drawdown funds are also required to be illustrated to age 99.
If left blank we will illustrate to age 99 only.

3 Product fees

Please select all that apply and refer to the Schedule of Fees for up to date fees.

Plan fees

Specialist Investment Purchase Fee

Specialist Investment Annual Fee

Connected Party Transaction Fee

Cash Transfer In Fee

In Specie Transfer In Fee

Additional charge for an in specie transfer in of a specialist investment

Additional charge for an in specie transfer in of a directly held investment

Total quantity of cash transfers

Total quantity of in specie transfers

Property fees

Additional fee if insurance is not via our block policy

Making VAT returns

Property/Land purchase or transfer in - one member

Additional fee if property is mortgaged

Registering the property for VAT

Additional property purchase fee using non-panel solicitor

Rent deposits

Rent reviews

Third party ownership

Vacant Property Fee

4 Investment manager charges

Please complete all that apply.

Ongoing External Investment Charges £ Attracts VAT

Ongoing External Investment Charges % Attracts VAT

Initial External Investment Charge £ Attracts VAT

Initial External Investment Charge % Attracts VAT

This will be noted as 1% by default if you hold investments via an investment manager and no figure is given.

5 Investment options

Record the percentage to be invested in each asset class, ensuring this totals 100%.

Asset class	Proportion to invest (%)	Asset class	Proportion to invest (%)
Cash Based Investments		Other	
Cash in SIPP Bank Account		Other Cash Deposits	
Corporate Bonds		Property Based Investments	
Equities		Zero Growth Investments	
Government Bonds		Commercial Property	
Managed Funds/Collectives			

6 Transfers

Please record each transfer separately to match the number of transfers as indicated in Section 3.

Uncrystallised transfers

Value	In specie (Yes/No)
£	
£	
£	
£	

Drawdown transfers

Value	In specie (Yes/No)	Capped or Flexi	Max income (capped only)	Next review date (capped only)	Income taken in current reference year
£			£		£
£			£		£
£			£		£
£			£		£

7 Contribution details

Please complete all that apply.

Employer regular contribution (gross) £

Frequency of payments Monthly Quarterly Half-yearly Yearly

Employer single contribution (gross) £

Personal regular contribution (net) £

Frequency of payments Monthly Quarterly Half-yearly Yearly

Personal single contribution (net) £

8 Income

Record details of the income below.

If you've selected full drawdown complete section 8.1

If you've selected partial drawdown complete section 8.2

If you've selected UFPLS complete section 8.3

8.1 Full drawdown

Gross income required	Whole fund	Nil	Other, please specify amount	£ <input type="text"/> each year
Percentage of tax-free lump sum to be taken	<input type="text"/> %			
Frequency of income payments	One off	Monthly	Quarterly	Where you select quarterly payments, we will pay income at the end of March, June, September and December.
	Half-yearly	Yearly		
Date of first payment	Month/Year	<input type="text"/>	<input type="text"/>	

8.2 Partial drawdown

Please select one of the options below:

1 Value of fund to be crystallised £

or

2 Percentage of tax-free lump sum to be taken %

Gross income required	Whole crystallised fund	Nil	Other, please specify amount	£ <input type="text"/> each year
Frequency of income payments	One off	Monthly	Quarterly	Where you select quarterly payments, we will pay income at the end of March, June, September and December.
	Half-yearly	Yearly		
Date of first payment	Month/Year	<input type="text"/>	<input type="text"/>	

8.3 UFPLS

Whole fund	Other	If other, please specify amount	£ <input type="text"/>
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Curtis Banks Pensions,
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Call charges will vary. We may record and monitor calls.

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