

# Benefit request form.

This form should be completed if:

- > You would like to start taking benefits from your scheme or,
- > You have already taken some benefits from part of your fund under your scheme and you would now like to take additional benefits from the rest of your fund.

We strongly recommend that you obtain financial advice that is specific to your personal circumstances before you proceed with drawdown.

## Member's details

Full name	<input type="text"/>
Scheme reference/name (if known)	<input type="text"/>

## Benefit details

You may be able to take a tax-free lump sum (up to a maximum amount as outlined below subject to sufficient uncrystallised funds being available) in addition to taxable one-off and/ or ongoing income payments with no maximum (subject to there being sufficient funds available in your pension fund), unless you are in 'capped drawdown'.

**How much of your pension fund would you like to crystallise?**  
Please select one of the options below.

a) Whole fund and take the maximum tax-free lump sum the fund can support

b) Sufficient to take the maximum remaining permitted tax-free lump sum available

c) Sufficient fund to provide a specified tax-free lump sum payment of:

**Do you wish to take income drawdown payments?** Yes  No

**If Yes, please confirm how much and payment frequency** Amount (£)

Monthly  Quarterly  Half yearly  Annually  Ad hoc

**Please note:**

Income payment is subject to tax at your marginal rate.

**Please note:**

If income is taken this could trigger your money purchase annual allowance (MPAA) and will restrict your ability to pay contributions into your scheme in the future unless you are in capped drawdown and remain with the capped limits.

## Bank account details

Bank name	<input type="text"/>
Account name	<input type="text"/>
Account number	<input type="text"/>
Sort code	<input type="text"/>

**Please note:**

This account must be held in your name and evidence will be required before the payment is made.

## Foreign bank account details

Bank name

Account number

Account name

IBAN

Routing number

Swift/BIC number

**Please note:**

This account must be held in your name and evidence will be required before the payment is made.

## Guidance and financial advice

Have you received advice from a regulated financial adviser recommending that you proceed with a benefit request?

Yes

No

If Yes, please arrange for the following section to be completed by the financial adviser.

Financial adviser's name

Financial adviser's FCA reference number

Financial adviser signature

Date (DD/MM/YYYY)

## Member's request

### I confirm that:

- > The information provided above is correct; and
- > I hereby request Dentons Pension Management Limited to make the lump sum and/or income payments (after deduction of income tax, where applicable) described above from my scheme bank account. I understand that it is my responsibility to ensure that there are sufficient funds for this purpose in that bank account and that the payments will not be made unless there are sufficient funds available.

Name in capitals

Signature

Date (DD/MM/YYYY)

## Definitions

'**MPAA**' means the Money Purchase Annual Allowance, this will apply when pensions are flexibly accessed and will restrict annual contributions to £10,000.

'**Crystallised**' is a process where the assets, have been made accessible to allow them to provide retirement/death benefits.



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Dentons Pension Management Limited is authorised and regulated by the Financial Conduct Authority, register number 461094.

VAT number for Dentons Pension Management Limited is 863 1639 14.

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