

Application for a Transitional Tax-Free Amount Certificate

To enable us to issue you with a Transitional Tax-Free Amount Certificate (TTFAC), we will need you to complete this form fully and accurately, as well as provide full and complete evidence. We will need details of all other pension benefits taken before 6 April 2024 as well as any benefits you have transferred to a qualifying recognised overseas pension scheme (QROPS) or that have been accessed flexibly.

Eligibility

Have you accessed any of your pension benefits between 6 April 2006 and 5 April 2024?

Yes No

Did you turn age 75 between 6 April 2006 and 5 April 2024?

Yes No

Has any money been withdrawn tax free from a pension scheme or transferred to an overseas scheme after 6 April 2024?

Yes No

You must be able to answer yes to one of the above questions to be able to proceed.

Are you applying to take benefits from your scheme?

Yes No

Please note:

Applications for a Transitional Tax-Free Amount Certificate that don't relate to taking benefits may take longer to complete.

Lifetime allowance

Do you hold lifetime allowance protection?

Yes No

If Yes, please provide a copy of your protection certificate.

Please note:

For individuals with Fixed Protection 2016 (FP 2016) there is no certificate and we will require their reference number. This can be obtained from their government gateway.

Pension savings and benefits you've already accessed

Please tell us about all other pension savings you have or have previously had with providers other than Dentons and other than the State Pension.

	Scheme 1	Scheme 2	Scheme 3
Name of scheme			
Date taken (DD/MM/YYYY)			
Tax-free cash taken (in whole pounds)			
Annual pension (in whole pounds)			
UFPLS Payment taken			
Standard LTA % Used			
HMRC Protected LTA percentage used (if applicable)			
Was this a Serious Ill Health Payment?			
Was the tax free cash amount more than 25% of the fund value?			

Pension savings and benefits you've already accessed continued

For Annuity Purchases only**Total funds used to purchase annuity****Date (DD/MM/YYYY)**

If you have transferred any pension benefits to a **qualifying recognised overseas pension scheme (QROPS)**, we will require the full details of this.

Did you reach the age of 75 before 6 April 2024?Yes No

If Yes, please provide a copy of the lifetime allowance certificate issued by your other providers for your 75th birthday.

Total Standard LTA percentage used**Total HMRC Protected LTA percentage used (if applicable)****Fund Value at age 75****Please note:**

For defined contribution schemes, this should be the total fund value of the plan at age 75. For defined benefit (final salary) schemes, this should be the capital value of the pension and lump sum calculated by the Scheme Administrator. You'll find this on a letter sent by the provider of the scheme.

Member's Declaration

- I confirm that the information I have given on this form is complete and accurate to the best of my knowledge.
- I have verified all the information set out above, including amounts and percentages, and I agree to provide Dentons with such additional evidence or information that they may request from time to time in connection with the Transitional Tax-Free Amount Certificate.
- I understand that by requesting a Transitional Tax-Free Amount Certificate it may **reduce** my tax free entitlement and once the certificate had been produced this cannot be rescinded and must be adhered to.
- I understand and acknowledge that Dentons may refuse to produce the Transitional Tax-Free Amount Certificate if it reasonably considers that it has incomplete evidence and/or information from me to do so.
- I will inform Dentons immediately if any of the information that I have provided in this form changes.
- I understand that where a Transitional Tax-free Amount Certificate that has been issued to me is later found to inaccurately reflect my entitlements Dentons may cancel this certificate and I would be liable for any additional tax due.

Financial Advice

I confirm that I have sought regulated financial advice in relation to my request for a Transitional Tax-Free Amount Certificate and I am comfortable with this advice.

Yes No

I confirm that I do not wish to seek regulated financial advice in relation to my request for a Transitional Tax-Free Amount Certificate and I understand the implications of doing so as set out in the above declarations.

Yes No

Member Name

Date (DD/MM/YYYY)

Member Signature

Financial Adviser

Adviser Name

Date (DD/MM/YYYY)

Adviser Company

Adviser Signature



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