



# Open Pension - Form D - Benefit Payment

Please confirm if the value of all the pensions you have already taken is below the Lifetime Allowance (please tick the appropriate boxes)

- 1) The total value of all benefits taken is less than the Lifetime Allowance (currently £1.8m).
- 2) The total value of all benefits taken is more than the Lifetime Allowance, or is within 20% of that amount.
- 3) I have a personal Lifetime Allowance, enhanced protection or a protected early retirement age.

Please state below the percentage of the available fund that you wish to take benefits from  
(The available fund is any part of the fund from which you have not previously taken benefits)

Non Protected Rights fund \*  100% OR  %  
Protected Rights fund \*  100% OR  %

\* Your protected and non-protected rights funds are divided into 1,000 segments. If this percentage does not equate to a whole number of available segments then we will round up to the nearest whole number of segments.

Please state below your income requirements

Pension Commencement Lump Sum  Maximum available OR  
 Specified amount £

Capped Drawdown Income  Maximum available OR  
 Minimum available OR  
 Specified amount £

Flexible Drawdown Income  Specified amount £

Frequency (please tick one)

Please indicate how often you wish your income to be paid. Please note that we apply a fee where income is paid more frequently than annually. Please see our fee basis for further details.

- Monthly  Quarterly  
 6-monthly  Annually

Start date of payments

OR on commencement of the plan (tick)

Please provide details of the bank account you would like us to credit your income payments to:

Bank name	<input type="text"/>	
Address	<input type="text"/>	
	<input type="text"/>	
Account Name	<input type="text"/>	
Sort Code / Account number	<input type="text"/>	<input type="text"/>
Reference (if any)	<input type="text"/>	

If you have selected flexible drawdown income please provide details of Relevant Income below to satisfy the minimum income requirement (please refer to your financial adviser)

<b>Source of Income 1</b>	<b>Details of person responsible for making the income payment</b>
Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Total income payable in the current tax year	£ <input type="text"/>
First income payment received in tax year	ending 5th April, <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

<b>Source of Income 2</b>	<b>Details of person responsible for making the income payment</b>
Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Total income payable in the current tax year	£ <input type="text"/>
First income payment received in tax year	ending 5th April, <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

<b>Source of Income 3</b>	<b>Details of person responsible for making the income payment</b>
Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Total income payable in the current tax year	£ <input type="text"/>
First income payment received in tax year	ending 5th April, <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Member Name	<input type="text"/>	Policy Number	<input type="text"/>
Signed	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please photocopy this page if you have any additional sources of income