Phased FAD Continuation Declaration

This form is to be completed in order to continue with the current phased flexi-access drawdown the client is receiving. Please ensure this form is completed within the appropriate time frame to ensure no delays.

Please note, there are Embark Pensions charges for taking benefits from your SIPP. These are available on our website.

SECTION 1 - MEMBER DETAILS

Title: Forename(s): Surname:

Date of Birth: National Insurance Number:

Ref:

Email Address:

SECTION 2 - PHASED FLEXI-ACCESS DRAWDOWN CONTINUATION

Phased flexi access drawdown is an option where you can take monthly income that has an element of pension commencement lump sum and an element of flexi access drawdown. We will crystallise funds for the year and pay out the pension commencement lump sum in 12 monthly instalments. You can also take monthly flexi access drawdown income alongside the pension commencement lump sum.

Please tick to confirm that the client would like to continue with the current phased flexi-access withdrawal amounts ☐

If the client requires a change in their phased flexi-access withdrawal amounts, please complete the below:

New monthly target amount £

How much of this target amount will be made up of:

PCLS £ Drawdown (taxable income) £

Please Note - Embark Pensions will have to crystallise enough pension to reach the PCLS target.

SECTION 3 - FINANCIAL ADVISER CONFIRMATION

LTA Confirmation

Has the client used up any of their LTA in the last 12 months as a member of another pension scheme? Yes ☐ No ☐

If yes, please confirm LTA used from other pension schemes in the last 12 months

Name of scheme/Pension Provider	Percentage of LTA used in last 12 months

Ifa declaration

By signing below, I can confirm that the client is still receiving financial advice and I have provided the customer with the relevant risk warnings attached to this transaction.

Adviser Name:

Adviser Company:

Adviser Signature:

FCA Registration Number:

Date:

Dunscar House, Deakins Business Park, Egerton, Bolton BL7 9RP

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