Small Pots Pension Form

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| --- | --- |
| Client name | <<Insert Details>> |
| Account ID | <<Insert Details>> |
| Lump sum requested | <<Insert Details>> |

|  |  |
| --- | --- |
| Auto-Disinvest option | No/Proportional/Largest |

I confirm:

* I have provided advice to the client regarding this transaction, the tax implications for the payment and their ability to access similar withdrawals in the future.
* The client is aware that the withdrawal, except for 25% of any lump sum from an uncrystallised plan, will be subject to income tax at their marginal rate
* To facilitate payments of greater than £10,000 SECCL will need to split the scheme into multiple pensions and then fully extinguish the benefits in a scheme.

|  |  |
| --- | --- |
| Adviser name | <<Insert Details>> |
| Signature | <<Insert Details>> |
| Date | <<Insert Details>> |

We can accept Docusign or other electronic signatures. Please return the form to Questions@YOUR-Platform.co.uk