Logo, company name

Description automatically generated**Small Pots Pension Form**

|  |  |
| --- | --- |
| Client Name |  |
| Account ID |  |
| Lump Sum Requested |  |

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

Logo, company name

Description automatically generatedI 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 |  |
| Signature |  |
| Date |  |

We can accept Docusign or other electronic signatures. Please return this form to [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk).