

# SIPP ILLUSTRATION REQUEST

Financial adviser	
Firm name	
Adviser name	
SIPP product name	
Client's full name	
Title (Mr, Mrs, Ms, Dr, etc.)	
Male/Female	
Date of birth (dd/mm/yyyy)	
Marital status	
Selected retirement age (between 55 and 75)	
Transfer in fund value (£)	
Transfer in source	
Single contribution value (£)	
Regular contribution value (£)	
Regular contribution frequency	
Investment split - standard assets (%)	
Investment split - cash (%)	
(if required) Immediate benefits - lump sum (%)	
(if required) Immediate benefits - lump sum (£)	
(if required) Benefits - regular income (£)	
(if required) Benefits - regular income frequency	
Drawdown - is transfer-in fund in drawdown?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Drawdown - start date of drawdown (dd/mm/yyyy)	
Drawdown - last review date (dd/mm/yyyy)	
Drawdown - is this flexi/capped/full/partial?	Flexi <input type="checkbox"/> Capped <input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/>
Drawdown - maximum GAD (£)	
Drawdown - current income per annum (£)	
Drawdown - current income frequency	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half-yearly <input type="checkbox"/> Yearly <input type="checkbox"/>
Initial adviser fee (£)	
Initial adviser fee (%)	
Ongoing adviser fee per annum (£)	
Ongoing adviser fee per annum (%)	
Investment management initial fees (£)	
Investment management initial fees (%)	
Investment management annual fees (£)	
Investment management annual fees (%)	
Investment management annual dealing charges (£)	
Investment management annual custody charges (%)	