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	No		
Drawdown - start date of drawdown (dd/mm/yyyy)				
Drawdown - last review date (dd/mm/yyy)				
Drawdown - is this flexi/capped/full/partial?	Flexi	Capped	Full	Partial
Drawdown - maximum GAD (£)				
Drawdown - current income per annum (£)				
Drawdown - current income frequency	Monthly	Quarterly	Half-yearly	Yearly
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 (%)				

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