Your Global SIPP – New Business Illustration Request

In order to help you meet the UK regulatory requirements to provide your client with a specific New Business Illustration for Your Global SIPP, please complete this form as fully as possible and email to illustrations@optionspensions.co.uk

The security and safety of your data and your client's data is very important to London & Colonial. A copy of the London & Colonial Privacy Notice can be found on the website: www.londoncolonial.com/privacy-notice

If you have any questions, or need to discuss specific client requirements please call us on + 44 (0) 330 124 1505

Financial Adviser Details

Adviser Firm: Adviser Name:

Email Address: Phone Number:

Client Details

Title:

Name:

Date of Birth: Day Month Year Intended Retirement Age:

Gender: MALE FEMALE Client Country of Residence:

Transfer Details

Name of Transferring Plan (Optional):

Estimated Transfer Value: Is the Transfer in Drawdown? YES NO

Is the transfer from a Defined Benefit (Final Salary) Scheme or a Scheme with Safeguarded Rights? YES NO

Drawdown Details

Is Client Taking Tax-Free Cash? YES NO Tax-Free Cash:

Is Client Taking Income? YES NO Income Required (£ per annum):

Income Frequency: MONTHLY QUARTERLY HALF-YEARLY ANNUALLY

Financial Adviser Fees

Initial Fee (£ or Percentage of Fund Value):

For Drawdown, is Initial Fee Before or After Tax-Free Cash? BEFORE AFTER

Annual Financial Adviser Fee :

Investments:

Investment Provider*: *Mandatory field for variable component basis.

PLATFORM INVESTMENT MANAGER DFM OFFSHORE BOND STRUCTURED PRODUCT

OTHER

Annual Management Charge (%): % Annual Administration Fee (paid quarterly):

FOR MORE INFORMATION PLEASE CONTACT
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