

Benefit Crystallisation Event Application Checklist

The Benefit Crystallisation Event (BCE) form must be fully completed even if just to confirm a section is not applicable. Incomplete forms have to be returned to the Intermediary which may delay payment to the client.

For further assistance completing this form, please contact Client Services on +44 (0) 1225 517 517.

 be take a single ad-hoc diracdown income payment, to be paid as soon as possible. a pay we the maximum available in or is income for its i	n on +44 (0) 1225 517 517.	1. Client Details - Complete the client details in full
and a growth is true is the set of the se		
 Second Second Second		
First is brown another in the standard will be a set of the book in the set of the book in the set of the book is the book		
A form a complete the choices a public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the form a complete the choices and public has been beaching for the second of the choices and public has been beaching for the second of the choices and public has been beaching for the short has been beaching for the choices and public has been beaching for the choices and public has been beaching for the choices and public has been beaching for the form the declaration. 2. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 3. And because the base beaching for the base beaching the form form the choices and public		
A dot dot of we have been signed a first in the result of a set of the result of th	National Insurance number	
I use to explore to develop Mark I use to explore to develop Mark Please ary not the maximum should RCL I use to block a loboration for the loboration for the loboration of th		
I with to the set uncoverability of multiple set of the second set of t	I wish to crystallise to drawdown fully	
Preserve the section another models	Please pay me the maximum allowable PCLS or <u>£</u>	All amounts must represent the gross figure.
 *Peace use the text the sponse translet as an include any income ter space to the NULL I de parchase an anoty for		
 In the double and soluble fixed In the soluble fixed soluble fixed In the soluble fixed soluble fixed In the soluble fixed soluble fix		
*For an ad hoc payment from a SIPP already in a grady by the data son a possile. • a yra the maximum available _ or		
We have with drawdown income payment: to be paid as soon as possible. To solve a signed with drawdown form available from the document lib To a provide drawdown form available from the document lib To a provide dramadown form available from the document lib To a provide dramadown form available from the document lib To a provide dramadown form available from the document lib To a provide dramadown form available from the document lib To a provide dramadown form available from the document lib To a provide dramadown form available from the document lib To a provide any extra information that will help with processing the instruction. S. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary beclarations in this section must be completed. To and 8. Client and Intermediary Declarations - the declarations for each are different so it is important that the client adown and used as a submediare adown incoment into the section will be returned to the Intermediary sign the correct declaration. Applications that have been signed in the incorrect box will be returned and the encorrect box will be returned and the incorrect box will be returned and the incorrect box will be returned and the encorediary. These must be wet signatures; digitally signed applications will not be accepted.		*For an ad hoc navment from a SIDD already in
14 Use a single advice displayed in them payment. The payment is given. The payment is given in the maximum available is great. 15 In the single advice displayed in the displayed in the displayed in the single advice and payment is given. 16 In the single advice displayed in the displayed in the displayed in the single advice and payment is given. 16 In the single advice displayed in the displayed in the displayed in the single advice advice and payment is given. 17 In the single advice displayed in the displayed in the displayed in the single advice a	hoc Income Withdrawal Payment	drawdown, please use the Ad Hoc Payment Incor
A. Comments – this section should be used to provide any extra information that will help with processing the instruction. 4. Comments – this section should be used to provide any extra information that will help with processing the instruction. 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 16. Lifetime Allowance Details 9. Section above. 6. Lifetime Allowance Details – Both questions in the section since the section above. 6. Lifetime Allowance Details – Both questions in the section. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary Sign the correct the mediated to any transmit and whell a barder on wrote the section must be completed. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct the mediated to any transmit and whell a barder on wrote the section is account details on the section must be completed. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct the mediated is a section in the section is account the section wrote the section. 8. Details – Details – Both questions in the incorrect parameter of the barder on wrote the section is account to the barder on wrote the section is account to the section. 9. A section must be completed. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 9. A section must be exected in the incorrect parameter on the section in the section instruction. 9. B section must be exected as a section generation of the section instruction. 9. A section is a section generat		Drawdown form available from the document libr
 4. Comments – this section should be used to provide any extra information that will help with processing the instruction. 4. Comments – this section should be used to provide any extra information that will help with processing the instruction. 4. Comments – this section should be used to provide any extra information that will help with processing the instruction. 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 1. If also providing intermediary bank details, please write these in the 'Comments' section above. 6. Lifetime Allowance Details – Both questions in this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 1. If also providing intermediary bank details, please write these in the 'Comments' section above. 6. Lifetime Allowance Details – Both questions in this section must be completed. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. Applications that have been signed in the incorrect maximum in the theorem of maximum in the solution envection. Applications that have been signed in the incorrect box will be returned to the Intermediary. These must be wet signatures; digitally signed applications will not be accepted. 		
at Details provide any extra information that will help with processing the instruction. at Details a count Holder Name at Bark/Building Society ournet account. We will use this account to make. 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. Code N S. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. The and Monace Details The important find on the previous chemical section is in the appropriate certificates in the 'Comments' section above. core or patiented to any transitional protection? Yes, please provide Advier certified topies of the appropriate certificates in the 'Comments' section above. core or patiented in any transitional protection? Yes core or patiented in the same section is the rest and income from particle or the previous chemical section is the section must be completed. core to be diaded on make payments according to my instructions. Where I already hold a SIPP or with the same wrapper further are wrapper for home to the patient in the section and the the provide score and mission and details to the previous score and and details in the section in the section shows and mission and the section is instructions. Where I already hold a SIPP or instructions are add the scheler equilibrium the the section is and the section and the section is and the section or and the section is and the section is and the section or and the section is and the section the sectin the protexecontal information could result in the set	mments	
a brain a provide dealls of your. Bank/Building Society current account. We will use this account to make a f Bank/ Building Society Account Holder Name c. of Bank/ Building Society Account Holder Name Code N No S. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. If also providing intermediary bank details, please write these in the 'Comments' section above. under to any transformation protection? image: the sector bank accounts the appropriate contractes concertation Trad corregt maximum approximation of protections in the approximation the sector bank accounts the approximation approximation approximation to the stand sectoring to my inductions. Where I already hold a SIPP concertation and Intermediary Declarations in this section must be completed. The relation accounts in the same approximation and I indicated at a sy maximum prove and the same wrapper number a my SIPP uncrystallised, Confirm that the BCE should be accepted. relation and the same wrapper number as my SIPP uncrystallised, Confirm that the BCE should be accepted and in the same administory. relation and the same approximation and I indicated as the asyme member and the syme member and the	e use uns space to provide any additional note or information, prease up not use a separate cover	
At Details epolod details of your Bank/Building Society current account. We will use this account to make set to you. is provide details of your Bank/Building Society current account. We will use this account to make set to you. I G Bank/Building Society Account Holder Name 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. I G Bank/Building Society Image: Society in the section is completed with the client's bank account details only and includes the BIC Code and IBAN. I mo if yes, please provide Advier certified opies of the appropriate certificates our stratistical my benefits from other pension schemes since 6April 2007 Yes the please provide Advier certified opies of the appropriate certificates our cyntalised on user parks according to my instructions. Where I already hold a Sign and the previous and income from previous meets of the appropriate certificates 6. Lifetime Allowance Details – Both questions in this section must be completed. cstor Declaration Sign and the make payments according to my instructions. Where I already hold a Sign and advise in respect to the appropriate certificates 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that be client and bold field of the appropriate certification are based with the client crystaliand in meeting advise in respect of the benefit reguest. this drawdown ward in understand that any maximum income limits that chis drawdown and inducted and the test of my knowledge and crystaliant are strue of this benefit reguest. t		
 For the result of any barrier to the second to th	nk Details	
 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 5. Bank Details – ensure that this section is completed with the client's bank account details only and includes the BIC Code and IBAN. 6. Lifetime Allowance Details – Both questions in the Comments' section above. 6. Lifetime Allowance Details – Both questions in this approximate remaining and addical attractions from the section and addical attractions. Where I already hold a SIP composite to the davadrene and addical attractions and addical attractions. 6. Lifetime Allowance Details – Both questions in this section and understand that any maximum mome limits that an addical designation to the davadrene and addical attractions. Where I already hold a SIP composite to the davadrene and addical attractions. The section must be completed. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 8. Detained to the flaw addical advice in respect of this benefit request. bar bet Drug and addical advice in respect of the benefit request. bar the tLice spremet value independent functional advice in respect of the benefit request. bar the tLice spremet value independent functional advice in respect of the benefit request. bar the tLice spremet value independent functional advice in respect of the benefit request. bar the tLice spremet value independent functional advice in respect of the benefit request. bar the tLice spremet value independent functional advice in respect of the benefit request. bar the the scient administrate. bar the tLice spremet value independent functin advice in respect of th	hent to you.	
 Code with the client's bank account details only and includes the BIC Code and IBAN. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please write these in the 'Comments' section above. If also providing intermediary bank details, please as write these in the 'Comments' section above. If also providing intermediary bank details, please above. If also providing intermediary bank details, please above. If also provide above. 	e of Bank/ Building Society Account Holder Name	
 and completed with the client's bank account details only and includes the BIC Code and IBAN. and completed with the client's bank account details only and includes the BIC Code and IBAN. and completed with the client's bank details, please write these in the 'Comments' section above. and the any transitional protection? and the any base provide Adviser certified copies of the appropriate certificates you crystallised any base fits from other pension schemes since 6April 2006? by and includes the BIC Code and IBAN. If also providing intermediary bank details, please write these in the 'Comments' section above. and advised degrading to make payment according to my indiructions. Where I already hold a SIPP on or patient bat were already in payment on 6 and advised and examinum income limits that to the dardown and understand that any maximum income limits that to the dardown may prevented by the sense variage runner as my SIPP uncystallised, confirm that this BCE should an additional degrade in this application are true to the base of my knowledge and alluster provide according to my registred paration schemes and additionate in respect of this benefit request. are that my answers to the questions in this application are true to the base of my knowledge and alluster provide advise in respect of this benefit request. are that hore taken independent financial advice in respect of this benefit request. are that the PCLS payment will be reinvested into any registred paration schemestement that provide the administrator. are that my answers to the questions in this application are true to the base of my knowledge and alluster in respect of this benefit request. are that my answers to the questions in this application are true to the base of my knowledge and alluster in respect of this benefit request. are that my answers to the questions in this application are true to the base of my knowledge		5. Bank Details – ensure that this section is
count Name		
time Allowance Details If also providing intermediary bank details, please write these in the 'Comments' section above. ue netited to any transitional protection?		only and includes the BIC Code and IBAN.
time Allowance Details we exitled to any transitional protection? s No s No yetiled to any transitional protection? s No s No yetiled to any transitional protection? s No yetiled to any transitional protection? s No	count Currency	If also providing intermediary bank details, please
u entitled to any transitional protection? s no types, please provide Adviser certified copies of the appropriate certificates nou crystallised any benefits from other pension schemes since 6April 2006? yrstallised % of Lifetime Allowance used 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 2 <td< th=""><th>time Allowance Detaile</th><th></th></td<>	time Allowance Detaile	
rou crystallised any benefits from other pension schemes since 6April 2007 Yes No r If no: Total current maximum grassinnual income from pensions that were a pay by in payment on 6 April 2006 If no: cs If opensions Total current maximum grassinnual income from pensions that were a pay by in payment on 6 April 2006 6. Lifetime Allowance Details – Both questions in this section must be completed. cstor Declaration Image: Stor Declaration Image: Stor Declaration and Understand that any maximum income limits that to this faradown and J Inderstand that any maximum income limits that to this drawdown wrapper will be reviewed and updated as a result of this benefit crystallisation 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. me that Processery.in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independent financial advice in respect of this benefit request. ure in that I have taken independen		
 If no: Crystallised % of Lifetime Allowance used 7% Set or Declaration 9% 9%<		
Crystallised % of Lifetime Allowance used Total current maximum gross annual income from aready in payment on 6 Aready in payment on 6 Aready in payment on 6 Aready in the second		
this section must be completed. This section mu	Crystallised % of Lifetime Allowance used Total current maximum	6 Lifatima Allowanca Dataile – Both quastions in
April 2006 April 2006 5 estor Declaration own with the same wrapper number as my SIPP numrystallised, I confirm that this BCE should a SIPP own with the same wrapper number as my SIPP numrystallised, I confirm that this BCE should an additional designation to this drawdown wrapper will be reviewed and updated as a result of this benefit crystallisation . 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that my answers to the questions in this application are true to the best of my knowledge and allure to provide accurate information could result in fines and additional tax charges. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the CLS payment will not be reinvested into any registered pension scheme beyond the imposed by HMRC from time to time, and should I decide to make such reinvestment I will provide tails to the scheme administrator. Time that I have taken independent financial advice in respect of this benefit request. Date DD/MMVY These must be wet signatures; digitally signed applications will not be accepted.	% pensions that were	
isstor Declaration 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 8. DOMMOVY 9. Dometry is the prevent of the base of the base of the prevent of the prevent of the prevent of the incorrect box will be returned to the Intermediary. These must be wet signatures; digitally signed applications will not be accepted.		
 A provide Global to make payments according to my instructions. Where I already hold a SIPP own with the same wrapper number as my SIPP uncrystallised, I confirm that this BCE should an additional designation to this drawdown mapper will be reviewed and updated as a result of this benefit crystallisation a re that my answers to the questions in this application are true to the best of my knowledge and induce accurate information could result in fines and additional tax charges. re that the PCLS payment will not be reinvested into any registered pension scheme beyond the mposed by HMRC from time to time, and should I decide to make such reinvestment I will provide tails to the scheme administrator. rm that I have taken independent financial advice in respect of this benefit request. ure Date DOVMMYY	% £	
 Some with the same wrapper number as my SIPP uncrystallised, I confirm that this BCE should an additional designation to this drawdown mapper will be reviewed and updated as a result of this benefit crystallisation 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 7. and 8. Client and Intermediary Declarations – the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. 8. Applications that have been signed in the incorrect box will be returned to the Intermediary. 8. These must be wet signatures; digitally signed applications will not be accepted. 	stor Declaration	
the declarations for each are different so it is important that the client and Intermediary sign the correct declaration. These must be wet signatures; digitally signed applications will not be accepted.	own with the same wrapper number as my SIPP uncrystallised, I confirm that this BCE should	
are that my answers to the questions in this application are true to the best of my knowledge and liver to provide accurate information could result in fines and additional tax charges. important that the client and Intermediary sign the correct declaration. are that the PCLS payment will not be reinvested into any registered pension scheme beyond the imposed by HMRC from time to time, and should I decide to make such reinvestment I will provide tails to the scheme administrator. important that the client and Intermediary sign the correct declaration. immetat I have taken independent financial advice in respect of this benefit request. Applications that have been signed in the incorrect box will be returned to the Intermediary. iser Declaration These must be wet signatures; digitally signed applications will not be accepted.	to this drawdown wrapper will be reviewed and updated as a result of this benefit crystallisation	
are that the PCLS payment will not be reinvested into any registered pension scheme beyond the imposed by HMRC from time to time, and should I decide to make such reinvestment I will provide tails to the scheme administrator. Applications that have been signed in the incorrect box will be returned to the Intermediary. These must be wet signatures; digitally signed applications will not be accepted.	are that my answers to the questions in this application are true to the best of my knowledge and	
tails to the scheme administrator. Applications that have been signed in the incorrect box will be returned to the Intermediary. ure Date DD/MEVY iser Declaration These must be wet signatures; digitally signed applications will not be accepted.	are that the PCLS payment will not be reinvested into any registered pension scheme beyond the	
ure Date DD/////Y box will be returned to the Intermediary. iser Declaration These must be wet signatures; digitally signed applications will not be accepted.	Imposed by HMRC from time to time, and should I decide to make such reinvestment I will provide tails to the scheme administrator.	
iser Declaration applications will not be accepted.		
ser Declaration applications will not be accepted.		
		These must be wet signatures; digitally signed
	Date DD/MIV/Y	
	ure Date DD/MMVYY ser Declaration Document of the above named client. I confirm that, where necessary, I	