

# Capped drawdown additional designation checklist

## Please do not mail to Fidelity

Please capture all listed information for account opening and complete the application online. Please DO NOT post this checklist to Fidelity, as applications made using this form cannot be processed and WILL be rejected.

### Personal details

Title	<input type="text"/>
First and other names in full	<input type="text"/>
Surname	<input type="text"/>
Gender	<input type="text"/>
Date of birth	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Home telephone number	<input type="text"/>
Work telephone number	<input type="text"/>
Mobile telephone number	<input type="text"/>
Email address	<input type="text"/>
FundsNetwork Pension account number	<input type="text"/>

**Not a US citizen**

I confirm that I am not a US citizen, am not resident in the US, and do not have an obligation to pay tax to the US tax authorities on my worldwide income.

<b>Nationality 1</b>	<input type="text"/>
<b>Nationality 2</b>	<input type="text"/>
<b>Nationality 3</b>	<input type="text"/>
<b>Nationality 4</b>	<input type="text"/>

In order to invest in the FundsNetwork Pension we are required to capture the nationalities, and in some cases the national identifiers, for reporting purposes. If you are a British Citizen only, this is your National Insurance number. If you hold dual nationality, or are a national of another country, then another identifier may be required. Your adviser can find the list of required nationality identifiers at <https://adviserservices.fidelity.co.uk/MiFID>

### Not been issued a national ID

If checked, skip to town of birth

<b>National identifier</b>	<input type="text"/>
<b>Town of birth</b>	<input type="text"/>
<b>Country of birth</b>	<input type="text"/>

# Capped drawdown additional designation checklist continued

## Crystallisation details

How much of your pension account do you wish to crystallise?

- All of my remaining uncrystallised account  
 Part of my uncrystallised account £

How much tax-free cash would you like to take?

- Maximum  
 A specified amount below the maximum £

Please select one of the following disinvestment options for tax-free cash

- I confirm I have made the necessary amount of cash available  
 Please pay the tax-free cash by proportionately selling units from each of the investments I am invested in

Please specify your existing capped drawdown account

number into which additional investments are to be added

Adding more money into your existing capped drawdown account will result in your maximum income being recalculated

## Taxable income details

Would you like to request a one-off gross income payment?

Yes  No

How much one-off gross income do you want to receive? £

Do you want to set up regular gross income?

Yes  No

How much gross income would you like to receive? £

NOTE: If you withdraw more than the maximum allowed income amount, your account will be converted to a flexi-access drawdown account and your annual allowance will reduce to £4,000.

How frequently would you like to be paid?

Monthly  Quarterly  Half Yearly  Yearly

What day of the month would you like to receive your regular income?

10th  25th

## Your bank details

Name of the bank or building society

Branch address  
(‘Care of’ and PO Box are not acceptable)

Account name

Account number  Sort code

Building Society Roll Number (if applicable)

# Capped drawdown additional designation checklist continued

## Lifetime allowance

Prior to this request, have you received any pension income from any other sources?  
(e.g. annuity, income drawdown, employer pension)

Yes  No

If yes to the above, did you start receiving any of these pension benefits on or after 6 April 2006?

Yes  No

If yes to the above, please provide the percentage of the lifetime allowance available.

%

If no to the above, please provide the total current value of all your pensions already in payment before 6 April 2006

If you exceed your lifetime allowance how would you like to take the excess?

- I wish to receive the amount in excess of the lifetime allowance as a lump sum subject to a 55% tax charge
- I wish to leave the amount in excess of the lifetime allowance within this drawdown account, subject to a 25% tax charge, to provide an income

## Transitional protection entitlements

Please indicate if you have successfully applied for any of the following types of transitional protections

- Enhanced protection
- Primary protection
- Fixed protection 2012
- Fixed protection 2014
- Fixed protection 2016
- Individual protection 2014
- Individual protection 2016
- Pension credit lifetime allowance enhancement
- Overseas transfer lifetime allowance enhancement

Please provide the relevant certificate number

**Please provide evidence of the entitlement to the type of protection selected above.**

## Adviser fee details

Initial fee    £  or  %    The initial fee is calculated on the value of the crystallisation before or after tax-free cash, as confirmed by your adviser

Ongoing fee    £  or  %    The ongoing monthly fee will apply to this drawdown account only

## Investment nomination

Would you like to nominate an investment to use to pay fees (if possible) if there is not enough cash available in your account?

Yes  No

Investment name

ISIN

# Capped drawdown additional designation checklist continued

## Deducting adviser charges

All fees will be deducted from cash within the account if possible. If there is not enough cash available, we will sell units/shares from a nominated investment (if chosen) or typically the largest fund holding.

### Company stamp



### Adviser signature



Date



## Declaration

In relation to my application for the Pension, I declare that:

- I agree to pay my adviser an initial fee and/or an ongoing fee, if applicable, as stated on this form and in accordance with the FundsNetwork Pension Client Terms. For all fees I instruct FundsNetwork to deduct monies from cash within the account or unit/shares from either a nominated investment or typically my largest fund holding to pay the fees. I understand that these fees will become irrevocably due and payable immediately on receipt of the monies by FundsNetwork and that FundsNetwork will then hold this money as agent of my adviser. I confirm that I have received a personalised illustration that shows the effect of the fees agreed on my investment.
- I authorise you to deduct the lifetime allowance charge, if applicable, from my pension account on the date that the funds are designated.
- I understand that if I am requesting a taxable withdrawal amount that exceeds my maximum permitted amount under capped drawdown, my account will be converted to flexi-access drawdown. As a result this will reduce my annual allowance to the prevailing money purchase annual allowance for all money purchase pensions of which I am a member.
- Where the sale of a fund with a fund manager's sell charge is required or an exchange traded investment subject to a dealing fee, I authorise you to sell enough of this investment to generate the amount required after those charges.
- Where a pension commencement lump sum is payable, that I will not be recycling the lump sum (as defined in Schedule 29 of the Finance Act 2004).
- The details given on the form are correct and complete to the best of my knowledge or belief.
- I have received advice from an intermediary qualified to advise on capped drawdown products.

### Your signature

By signing here I confirm that I have read and completed all the relevant sections as per the instructions on this form.

### Signature



Date

