



# *initial benefit request*

FOR DIRECT CLIENTS



### About this initial request form

This form should be used to establish drawing pension benefits from your SIPP, where you wish to draw or vary income from an existing drawdown fund or where you wish to switch from capped drawdown to flexi-access drawdown.

By completing this form, it will enable us to issue you with the correct paperwork for your purposes, thus avoiding unnecessary delays.

## Part A Personal Information

@sipp Member Number

Permanent Residential  
Address

Email\*

Telephone Number

Mr/Mrs/Miss/Ms/Other		Surname		
Forename(s)				
Postcode				
		Date of Birth		

**\*For the purposes of this request, we will communicate with you going forward by email where you supply your email address above.**

## Part B Purpose of your request

Please select the appropriate purpose of your request:

- ☐ to establish drawing pension benefits from your SIPP
- ☐ where you wish to draw or vary income from an existing drawdown fund
- ☐ where you wish to switch from capped drawdown to flexi-access drawdown

## Part C Pension guidance and regulated advice

Have you taken pensions guidance from Pension Wise in relation to this benefit payment request?

☐ Yes ☐ No

Have you taken regulated advice in relation to this benefit payment request?

☐ Yes ☐ No

**You now have more options on what you can do with your pension savings. We would therefore strongly recommend you get pensions guidance or regulated advice to help you with this decision, if you haven't done so.**

Pension Wise, a government service from Money Helper, offers free and impartial guidance about your pension options.

With an appointment with Pension Wise, an independent pension specialist will talk through your options to help you make the right decision about what to do with your pension savings. You'll also find out about the other factors you need to consider when deciding on your options.

Alternatively, you can take regulated financial advice, at your own cost, which give you a tailored recommendation based on your specific circumstances and objectives.

You can use Money Helper's [Retirement Adviser Directory](#) to find a regulated and impartial adviser to help you make the best decision about accessing your pension savings.

## Part D Offer to book Pension guidance appointment

If you would like to go ahead with a free appointment with Pension Wise, we can book an appointment for you.

Do you want @sipp to book an appointment with Pensions Wise for you?

☐ Yes ☐ No

If YES, please just let us know your availability by completing the table below:

Date	AM/PM

If NO, is this because you would prefer to book an appointment by yourself?

☐ Yes ☐ No

You can book an appointment with Pension Wise by calling 0800 138 3944 or book an appointment online via the [Money Helper website](#).

## Part E Member Declaration

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I declare that the information contained on this form is, to the best of my knowledge and belief, true, complete and not misleading

Member's Signature

Date

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