FOR ADVISER USE ONLY

THE SIMPLE INVESTMENT 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 The Simple Investment SIPP, please complete this form as fully as possible and email to CustomerRelations@londoncolonial.com

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 the London & Colonial Customer Relations Team on +44 (0)203 479 5505

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

Transfer Details

Name of Transferring Plan *(Optional)*:

Estimated Transfer Value:

Is the Transfer in Drawdown? ○ YES ○ NO

Drawdown Details

Is Client Taking Tax-Free Cash? ○ YES ○ NO — Tax-Free Cash: *(£ or Percentage of Fund Value)*

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 *(ongoing)* Financial Adviser Fee *(£ or Percentage of Fund Value)*:

Investments:

Investment Provider*:

*This field is mandatory for when selecting Variable Component Fee Basis.

○ PLATFORM ○ INVESTMENT MANAGER ○ DFM ○ OFFSHORE BOND ○ STRUCTURED PRODUCT

○ OTHER

Annual Management Charge (%): %

LONDON & COLONIAL
INNOVATION IN PENSIONS

PART OF STM GROUP PLC

For more information please contact:
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