

5. Tax Rate

For the purposes of the illustration we will assume that you are a basic rate tax payer and will use a tax rate of 20%. If you are a higher rate tax payer and would like an illustration based on a tax rate of 40% please tick here:

6. Opting Out Notice

All members who submit a request will receive illustrations based on drawing benefits under Flexi-Access Drawdown and Uncrystallised Funds Pension Lump Sum. If you are already taking benefits from your Brooklands SIPP prior to 6th April 2015 then we will provide you with a Capped Drawdown illustration in addition.

If you know specifically which type of illustration you need, or if you do not want to be provided with all of the illustrations noted above, then please select the illustrations that you DO NOT wish to receive below:

Flexi-Access Drawdown

Uncrystallised Funds Pension Lump Sum

Capped Drawdown

7. General Declaration

I understand that on receipt of this form Heritage Pensions Limited will produce the specified benefit illustration (s) for me based on the information that I have provided.

I understand that as a member of the Brooklands SIPP, I am entitled to one illustration every twelve months free of charge and that any additional illustrations within that same twelve month period will be chargeable as per the Brooklands SIPP fee schedule.

I understand that the illustration will be valid for 60 days after which I may be charged for a further illustration before taking benefits.

8. Advice Declaration

I understand that Heritage Pensions Limited is not authorised to give financial advice in relation to whether or not I should draw benefits, the level at which I draw benefits, or the tax position on those benefits.

I understand that Heritage Pensions Limited strongly recommend that I seek advice from an authorised financial adviser that is specific to my circumstances before proceeding with any illustration request.

I understand that I can contact Pension Wise which is a free and impartial government service that will help me understand my new pension options and that more information can be found on the Pension Wise website (www.pensionwise.gov.uk).

If you do not have a financial adviser, or have chosen not to seek financial advice, please tick here:

Member Signature

Member Name

Date [dd/mm/yy]



IVCM Heritage Pensions

The Brooklands SIPP is operated by Heritage Pensions Limited who are authorised and regulated by the Financial Conduct Authority. The asset trustee for the Brooklands SIPP is IVCM Heritage Trustees Limited. An agreement is in place between Heritage Pensions Limited and IVCM whereby certain administrative functions in respect of the Brooklands SIPP are outsourced to and undertaken by IVCM.