## IIranCertIntP 05/24

## TRANSITIONAL TAX-FREE AMOUNT CERTIFICATE INFORMATION REQUEST



**Customer name** 

**Account number** 

So that we can consider issuing you with the Transitional Tax-Free Amount Certificate you've requested, we need to ask you for more information. The information you give us must be complete and accurate and cover details of all the pension arrangements held, either with us or with other providers.

We need details of all other pension benefits taken before 6 April 2024, that are either already in payment, in income drawdown, transferred to a qualifying recognised overseas pension scheme (QROPS) or that have been accessed flexibly.

If you turned 75 prior to 6 April 2024, we'll also need details of the LTA test that was undertaken at age 75 by each relevant provider.

If you don't have all this information, you'll need to get it from the pension administrator / provider in question before you fill in this form. You need to provide documents to evidence all of the above with this form . We will not be able to process this request until all evidence is received.

You must tell us straight away if any of the information you have provided changes.

1.	Before vol	fill in this for	n, we need to	check vou're	eligible to	apply:
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, ,	cessed any of your pension benefits, or transferred to an overseas pension scheme (QROPS) april 2006 and 5 April 2024?		
Yes	□ No		
b) Did you turn	age 75 between 6 April 2006 and 5 April 2024?		
Yes	□ No		
If you've answered 'No' to both of the questions above, we won't be able to issue you with a transitional tax-free amount certificate, so please don't continue with your application.			
c) Has any mon	ney been withdrawn tax free from a pension scheme after 6 April 2024?		
Yes	□ No		
If you've answered 'Yes' to question C above, we won't be able to issue you with a transitional tax-free amount certificate, so please don't continue with your application.			
d) Are you appl	lying because you want to take a withdrawal from your pension?		
Yes	If YES, please tell us the date you'd like to take/start your withdrawal so we can complete this application in time.		
	Date (DDMMYYYY)		
☐ No	If NO, be aware that applications for a Transitional Tax- Free Amount Certificate that don't relate to withdrawals can take up to 90 days to complete.		

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Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Name of scheme		
Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Name of scheme		

3.3 Please provide details of all money or benefits from your pensions between 5 April 2006 and 6 April 2024, together with the related percentage of the standard lifetime allowance used. Your pension provider should have given you this information when you took benefits such as pensions, lump sums, or tax-free cash. Note that if you cannot complete this section, you must complete either section 4 or section 5 in order to receive a certificate.

It's important to include both the value of benefits and the related standard lifetime allowance percentage. If you don't have this information, you can contact your provider to ask for it. Please note that you will need to provide this evidence to us. You don't need to tell us about the State Pension or a pension you've been paid after someone else's death.

Please continue on a separate piece of paper if there isn't enough space below.

Lump sum may include the following types of payments:

- Pension Commencement Lump Sums the amount of money available 'tax free' as a lump sum when benefits are taken.
- Uncrystallised funds pension lump sum a way of taking an ad hoc sum from your pension, 25% of this payment would have been paid tax free and the remainder taxable as income.
- Serious ill health payments benefits may be paid as a lump sum when individuals are no longer able to work due to health issues.

Please do not include "small pot" payments (where the total pension value was less than £10,000 and the first 25% was tax free), taxable payments from drawdown or payments received as a beneficiary.

## **Lump sums or Pension / Annuity Purchase**

Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Name of scheme		
Was the tax free cash amount more	than 25% of the fund value	Yes No
Was this a Serious III Health Paymen	1?	Yes No
Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Date taken (DDMMYYYY)  Name of scheme	Tax free cash (in whole pounds)	
	Tax free cash (in whole pounds)	

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<b>Lump sums</b> (continued)		
Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Name of scheme		
Was the tax free cash amount more t	nan 25% of the fund value	Yes No
Was this a Serious III Health Payment	?	Yes No
Date taken (DDMMYYYY)	Tax free cash (in whole pounds)	Total LTA percentage used
Name of scheme		
Was the tax free cash amount more t	nan 25% of the fund value	Yes No
Was this a Serious III Health Payment	?	Yes No

Yes If Y	ES please tell us how muc	ch of your standard	lifetime allowance w	ne usad
□ Na KA		•	menne anowance wo	us useu.
	NO please go to section 5			
Transfer date	(DDMMYYYY)	Total transferre	ed (in whole pounds)	Standard LTA percentage used
Name of recei	ving scheme			
Transfer date	(DDMMYYYY)	Total transferre	ed (in whole pounds)	Standard LTA percentage used
Name of recei	vina scheme			
Did you read	ch the age of 75 be	efore 6 April 2	024?	
	ES please provide a copy or 75th birthday and comp			ed by your provider for
	IO please go to the Decla			
Date age 75 a	ttained (DDMMYYYY)	Total Sta	ndard LTA percent	age used
			$\neg . \Box \Box$	
Name of scher	ne 1 — I — I — I — I — I			
Pension Provid	er Name			
Pension Provid				
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For defined cont salary) schemes Administrator. You not and attach it to Next Steps Important: Please Total LTA perconstruction I confirm that I have you applied lifetime allowance Section 3 Total value of peraccessed Section 4 Have you ever trop salary in the salary	tribution schemes, this ship, this should be the capit ou'll find this on a letter size more benefits to tell us this form.  See complete the list belowentage Used up to 6th and a complete the following the total protect or energy.	w before signing the April 2024  wing sections:	completed  Yes  Yes	at age 75. For defined benefit (final calculated by the Scheme eparate sheet of paper eturning your form to us.  I have enclosed supporting evidence Yes / Not Applicable Yes / Not Applicable

## 7. Declaration

I declare that:

- · I confirm that the information I have given on this form is complete and accurate to the best of my knowledge.
- I have verified all the information set out above, including amounts and percentages, and I agree to provide Fidelity with such additional evidence or information that they may request from time to time in connection with the Transitional Tax-Free Amount Certificate.
- I understand and acknowledge that Fidelity may refuse to produce the Transitional Tax-Free Amount Certificate if they reasonably consider that it has incomplete evidence and/or information from me to do so.
- I will inform Fidelity immediately if any of the information that I have provided in this form changes.
- I understand that if the information provided is found to be incomplete and inaccurate, I could be fined up to £3,000 by HM Revenue & Customs.
- I understand that where a Transitional Tax-free Amount Certificate that has been issued to me is later found to inaccurately reflect my tax-free entitlements, Fidelity reserve the right to cancel this and I may then be liable for any additional tax due.

Signature	Date signed
	(DDMMYYYY)
Name	
Are you a Scheme member	
Personal representative	
Financial adviser	
Other (please state)	
Where this form is being submitted by an adviser on be	ehalf of a customer:
Financial Adviser Signature	Date signed (DDMMYYYY)
Firm name	
FCA number I confirm that I am registered with the FCA to cor	nduct business and my authorisation number is:

Financial Administration Services Limited, which is authorised and regulated by the Financial Conduct Authority (FCA Register number 122169) and registered in England and Wales under company number 1629709 whose registered address is Beech Gate, Millfield Lane, Lower Kingswood, Tadworth, Surrey, KT20 6RP.