

TRANSITIONAL TAX-FREE AMOUNT CERTIFICATE INFORMATION REQUEST



Scheme name

Member name

Plan/arrangement 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. Our covering letter and guide to completing this information request are designed to help you.

Note: If benefits have previously been taken with another provider, you'll need to find information about that payment and the notification received confirming the amount of lifetime allowance (LTA) used. Make sure you have this ready before you complete this form.

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

1. Before you fill in this form, we need to check you're eligible to apply:

a) Have you accessed any of your pension benefits between 6 April 2006 and 5 April 2024?

Yes No

b) Did you turn age 75 between 6 April 2006 and 5 April 2024?

Yes No

c) Has any money been withdrawn tax free from a pension scheme or transferred to an overseas scheme after 6 April 2024?

Yes No

If you've answered 'No' to all 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.

d) Are you applying 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)

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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.

Members 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)