

Momentum Pensions Limited

Retirement Options Form

01. MEMBER DETAILS

Forename	Surname	Date of Birth
Date left the UK	Current Tax Residence	Current Tax Reference

02. RETIREMENT OPTIONS FORM

Currency of benefits:	<input type="checkbox"/> GBP £	<input type="checkbox"/> Euro €	<input type="checkbox"/> Other:
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PENSION COMMENCEMENT LUMP SUM

I request that the Scheme Administrator pays the Pension Commencement Lump Sum as per the following preferences:

Pension Commencement Lump Sum Level:	<input type="checkbox"/> Maximum Allowed	<input type="checkbox"/> Specified Amount:
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INCOME BENEFIT

I request that the Scheme Administrator pays the Income Benefits as per the below references:

Income Level:	<input type="checkbox"/> Maximum Allowed	<input type="checkbox"/> Specified Amount*:
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If Specified Amount:	<input type="checkbox"/> One-off	<input type="checkbox"/> Regular Annual Amount
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If Regular:

How often do you want your income to be paid?	<input type="checkbox"/> Annually	<input type="checkbox"/> Semi-Annually	<input type="checkbox"/> Quarterly
Commencement Date:	<input type="checkbox"/> As Soon As Possible	<input type="checkbox"/> Date:	

*This amount must be less than the maximum allowed based on your current fund value and the UK Government Actuary's Department (GAD) rates. Where relevant, we will advise you of the maximum income level and adjust your chosen income level accordingly if it is necessary.

02. RETIREMENT OPTIONS FORM (continued)

BANK DETAILS

I request that benefits are to be paid to the following bank account, held in my own name:

Bank Name	Account Name
Sort Code	Account Number
SWIFT / BIC Code	IBAN Number

03. DISINVESTMENTS

I request that benefits are to be funded by the following disinvestments from within the investment policy:

<input type="checkbox"/> 100% Cash Fund	<input type="checkbox"/> From funds listed below:
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Fund Name	Currency	Amount
Fund Name	Currency	Amount
Fund Name	Currency	Amount
Fund Name	Currency	Amount

Please complete a separate page if further funds are required.

04. BENEFIT DECLARATION

I hereby request that the benefits indicated in this form are paid to me, and understand that the maximum allowance will be reviewed periodically, in accordance with regulatory requirements.

I understand that the Pension Commencement Lump Sum can only be paid out once. Therefore, should I elect to commence Income benefits, in preference to a Pension Commencement Lump Sum or should I elect to take a reduced Pension Commencement Lump Sum, I understand I will not be entitled to any further Pension Commencement Lump Sum at a future date.

I understand that it is my sole responsibility to declare any benefits I may receive from the Scheme in the country where I am tax resident. I therefore hereby irrevocably and unconditionally agree to fully and effectually indemnify and keep indemnified Momentum Pensions Limited from and against any tax liability, interest or charges of whatever nature (including all associated costs) that may be incurred by Momentum Pensions Limited as a result of any false or incorrect declaration I have made, and which ultimately results in such a liability being imposed by any tax authority in any country. I also confirm that should my tax residency change, I shall notify Momentum Pensions Limited within 7 days of such change taking place.

I authorise Momentum Pensions Limited to submit my tax return to the Isle of Man Income Tax Division and if applicable, pay any Income Tax due on the income I receive prior to paying the benefits to me.

Applicant's Signature	Date
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Momentum Pensions Limited, authorised and regulated by the Isle of Man Financial Services Authority and registered as a Retirement Benefits Schemes Administrator under Company Number RA102, registered at 1st Floor, 20 Athol Street, Douglas, 1M1 1JA, Isle of Man.