

Income Drawdown Plan

Income request form

Please complete this form if you wish to take income from your Income Drawdown Plan or change your existing income instruction.

IMPORTANT INFORMATION

- Income is paid on the 1st of each month (or the previous available working day if this is a Bank Holiday or weekend) directly into an account in your name, or to a nominated account which you hold jointly with someone else.
- To pay your income, units are sold from your CF Cash Fund holding. If there are insufficient monies in your CF Cash Fund, we will sell units from your funds in order of their risk rating. This order is published in the **Guide to CF Investment Funds**.
- Income payments are subject to income tax, which will be deducted under PAYE before payment is made. If you have a P45 from the current tax year, please supply it to us. Otherwise, your income will be taxed with an emergency tax code until we are informed by HMRC of your correct tax code.
- For income to be paid on the 1st of the following month (or the previous available working day if this is a Bank Holiday or weekend), your request to start income should be received on or before the 15th of a month.
- Taking income from this product will limit the amount you can contribute to defined contribution pension plans to £10,000 per annum. This is called the Money Purchase Annual Allowance (MPAA). Please contact your financial adviser for more information.
- Please use **BLOCK CAPITALS** and black ink to fill in this form. If you make a mistake, please initial any changes you make.
- Please return your completed form to CFML, PO Box 1043, CHELTENHAM GL50 9JB. Or email the signed scanned document to PPPadmin@capita.co.uk. Please note that if this option is taken we are unable to guarantee complete security.

If you have any queries about this form or need help, please call us on 0345 055 0606 between 9am-5pm Monday to Friday.

1. Your details

Mr/Mrs/Miss/Ms or other title

Surname

First name(s)

Plan number

Telephone number

2. Income payments

Income options:

		Please tick	Amount
EITHER	One-off income payment (please give gross figure)	<input type="checkbox"/>	£ <input type="text"/>
OR	Regular income (please give gross figure)	<input type="checkbox"/>	£ <input type="text"/>
How often do you want your regular income to be paid?	Monthly <input type="checkbox"/>	Quarterly <input type="checkbox"/>	Annually <input type="checkbox"/>

For regular payments, which month do you want to start taking income?

Please note: We will contact you if we cannot set up the benefits specified in this section. It may take up to five days for the payment to clear into your account.

3. Your bank details

Name of account holder(s)	<input type="text"/>
Name of bank	<input type="text"/>
Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Bank sort code	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>
Address of bank	<input type="text"/>
	Postcode <input type="text"/>

4. Consent and signature

I request and consent to CFML making income payments from my Income Drawdown Plan as detailed in this Income request form. I understand income payments are subject to PAYE income tax, which will be deducted before the payment is made.

You must complete the boxes marked with crosses

Signature	<input type="text"/>
	X
Print full name in CAPITALS	<input type="text"/>
	X
Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Enclosed a P45 for the current tax year, if available.	<input type="checkbox"/>