

SSAS member request to move from capped drawdown to flexi-access drawdown

This form allows you to move from capped drawdown to flexi- access drawdown at any time from 6th April 2015.

Return to: Xafinity SIPP Services Ltd, Scotia House, Castle Business Park, Stirling, FK9 4TZ.

SSAS details

SSAS name	<input type="text"/>
SSAS reference no	<input type="text"/>
SSAS member name	<input type="text"/>

Your financial adviser

Did your financial adviser advise you to take flexi access drawdown?	<input type="text" value="Yes / No"/>
Will your financial adviser be the same as at present?*	<input type="text" value="Yes / No"/>

If no, please provide details of your new adviser below:

Name of adviser	<input type="text"/>
Name of adviser firm	<input type="text"/>
Address	<input type="text"/>
FCA Authorisation Number	<input type="text"/>
Contact phone number	<input type="text"/>
E-mail	<input type="text"/>

Your declaration

Before signing this declaration carefully read the taking your benefits section of the SSAS Member Trustee Guide. If you don't understand any point please refer to your financial adviser.

By signing below I confirm that:

- I have received a copy of the SSAS Member Trustee Guide;
- I understand that moving to flexi-access drawdown and then drawing a payment will trigger the Money Purchase Annual allowance Rules; and
- I will move to flexi-access drawdown on the date that Xafinity SIPP Services Limited receives this notification or DD/MM/YY if later.

SSAS Member/Trustee or Dependant Member signature	<input type="text"/>		
Date of signing	<input type="text" value="DD/MM/YYYY"/>		
Trustee signature	<input type="text"/>	Print name	<input type="text"/>
Trustee signature	<input type="text"/>	Print name	<input type="text"/>
Trustee signature	<input type="text"/>	Print name	<input type="text"/>
Trustee signature	<input type="text"/>	Print name	<input type="text"/>
Date	<input type="text" value="DD/MM/YYYY"/>		

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