

Supplementary Information Form: Phased Retirement/Income Drawdown Form P1

1. Please consider the following options and rank them from 1 to 6 in the order of their importance to you at this time (1 for the most important, 2 for the next most important and so on). Your priorities will be reviewed with you each year.

| | |
|--|--|
| Preserving the pension capital for my next of kin in the event of death | |
| Having the flexibility to vary the pension income to suit my changing needs | |
| The security of my pension income | |
| Achieving further growth on my pension funds | |
| The opportunity to take advantage of future variations in market annuity rates | |
| The option to take tax free cash without having to buy an annuity at the same time | |

2. Your attitude towards investment risk may be different when it comes to your pension benefits. Please confirm which of the following best represents your views at this time. (Your views may change as you get older and will be updated each year).

| | |
|--|--|
| I wish to take no risk at all with my pension benefits | |
| I am prepared to accept a modest amount of risk for at least five years | |
| I feel I can afford to take a balanced degree of investment risk for at least five years | |
| To improve the growth I am willing to take higher risks for at least a few years | |
| To improve the growth I am willing to take higher risks for as long as possible | |

3. Some people are more heavily dependant on their pension than others. Your degree of dependency may also change as time goes on and will be reviewed each year. Dependency can be measured in relation to other financial resources. Please therefore confirm the following:

| | | |
|--|---|------|
| Value of your realisable assets (excluding main residence and business interests) | £ | |
| Expected after tax earned income in the next five years (totalled) | £ | |
| If you are in business what is the lowest value you could expect on selling | £ | |
| Total estimated value of your pension benefits available for transfer | £ | |
| Current value of any other pension funds (including your spouse) | £ | |
| Current pensions in payment (including your spouse) that increase with inflation | £ | p.a. |
| Current pensions in payment (including your spouse) that increase not index linked | £ | p.a. |
| Current pensions in payment (including your spouse) that do not increase at all | £ | p.a. |
| State pensions (joint) (actual or forecast) | £ | p.a. |
| Inheritances expected in the next five years (lowest estimate) | £ | |

N.B. Please ensure all boxes have been filled before signing the form as this information is essential to support the advice we give in connection with your pension options.

Signed _____

Date _____