

Income Instruction Form Guidance

Quick actions:

Document reference H120G

1. Member details

Forename(s)	Your first name and any middle names.
Surname	Your last name.
Date of birth	Your date of birth in the format DD/MM/YY.
Hornbuckle plan number	Your plan number is an 8-character alpha-numeric reference that we quote on our correspondence. The plan number will either start "DW" followed by six numbers (e.g. DW123456), or with six letters followed by two numbers (e.g. ABCDEF01).
Email	Your preferred contact email address. We will use your email address to send you information relating to the administration of your plan, so you should avoid using a work email address or another address likely to be accessed by someone else.

2. Income instruction

Required annual income	The amount of income you want to take annually from your plan. If you are being paid a capped drawdown pension and you request an amount that is greater than the maximum payable, we will pay you the maximum amount.
Frequency	Select the frequency of income payments you would like to receive. Except where you have elected to receive a single one-off payment, we will continue to pay you the level of income and in the frequency you select unless you inform us otherwise. The continued payment of a pension income will also depend on there being sufficient cash held in your plan for this purpose. You should regularly review the investments held in your plan to ensure that there is enough cash in the plan to facilitate these ongoing payments.

For the purpose of HMRC determining the tax code to apply to your pension payments, you will be required to confirm whether or not you are currently receiving an income from another source. Select which of the three statements (A, B or C) that applies to you.

We will send you a P60 each year to confirm the amount of income we have paid and the amount of tax deducted.

We will email you a payslip in relation to each income payment we make.

If you are a joint signatory of your pension scheme bank account, and you are not currently receiving an income from your plan, you will need to complete a Direct Debit mandate for the account in order to give us the authority we need to withdraw your pension income. You can find copies of Direct Debit mandates for all of our pension scheme account providers (Bank of Scotland, Cater Allen Private Bank, Barclays, Butterfield Bank and Royal Bank of Scotland) on our website.

3. Your bank details

You should use this section to provide us with details of the bank account to which you would like us to pay your pension income.

If the account is denominated in a currency other than sterling then any bank charges in relation to the conversion of your payment(s) to your chosen currency will be payable from your plan. The exchange rate will depend on the rate applied by the SIPP bank account provider on the date of the payment(s).

4. Member declaration

You should sign and date this section of the form where indicated.

Get in touch

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