



Self-Invested Personal Pension (SIPP)

Annuity Purchase Application Form

Personal Details

Title (Mr/Mrs/Ms/Dr/Rev etc)	
Surname	
Forename(s)	
Full Home Address	
Date of Birth	

Annuity Provider

Please confirm the annuity provider's details below:

Provider	
Provider Address	
Policy/Contract/Illustration Number	

Please enclose their paperwork for our completion, along with a copy of the illustration. These can be obtained from your financial advisor if you have not been sent these direct.

Annuity Required

Are you looking to purchase:

Part – Purchasing an annuity using a specific % of your fund, or number of segments

Please indicate the specific amount: £ _____ / _____ %

Full – Purchasing an annuity using your full SIPP fund

Pension Commencement Lump Sum

Please enclose their paperwork for our completion, along with a copy of the illustration. These can be obtained from your financial adviser if you have not been sent these direct.

Bank/Building Society Name	
Full Home Address	
Sort Code	
Account Name	
Name on Account	

Declaration

1. I am applying to Punter Southall SIPP Limited for the withdrawal of benefits to purchase an annuity outside of my SIPP.
2. I understand that all liability previously held with Punter Southall SIPP Limited will cease on transfer of the funds to the annuity provider.
3. Where a full annuity purchase is undertaken and I have previously been invested with a portfolio manager, I understand that the SIPP bank account will continue to stay open for a maximum period of 6 months, to enable any unclaimed dividends to be collected. Depending on the annuity provider, I also realise that these dividends may be paid to me from Punter Southall SIPP Limited as taxable income, if the annuity provider will not accept dividends as additional funds below a certain amount.
4. I understand that it is an offence to make false statements and these could lead to severe penalties or prosecution.

Punter Southall SIPP Limited will apply a one off Service Charge amount of £100 + VAT for administering this annuity purchase.

The completion of this form does not constitute advice being given by Punter Southall SIPP Ltd.

Name	<input type="text"/>	Signed	<input type="text"/>
Date	<input type="text"/>		

Punter Southall SIPP is available through an FCA registered Financial Adviser or on an Execution Only basis

Punter Southall SIPP is a trading name of Punter Southall SIPP Limited. Punter Southall SIPP Limited is authorised and regulated by the Financial Conduct

Authority. FCA Registration No. 189480. Registered office: 11 Strand, London WC2N 5HR · Registered in England and Wales No. 3633950

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