

# Pensions in drawdown illustration request form

Please complete the following sections in full and return to [client.relations@nucleusfinancial.com](mailto:client.relations@nucleusfinancial.com).

Please note that this form should only be used for pension drawdown cases that cannot be run on our platform, i.e. protected tax free cash. All other drawdown and pension illustrations can be completed through our platform. If you've any questions please contact your client relations manager who'll be delighted to help.

|                             |  |
|-----------------------------|--|
| Adviser firm                | PCLS required (n/a or percentage or amount)  |
| Adviser name                | Capped* or flexi access drawdown<br>*Only available on existing capped drawdown arrangements |
| Client name                 | Already in drawdown (please select) Yes      No  |
| Male      Female            | If already in drawdown, last mandatory review date   |
| Date of birth               | If already in drawdown, current max GAD figure   |
| Investment amount           | Income required  |
| Existing client or transfer | Frequency of income  |
| Asset charge (initial)      | Additional comments  |
| Asset charge (annual)       |  |
| Additional fund expenses    | <b>For client relations use only</b><br>Illustration request form checked                    |
| Initial fee                 | Illustration prepared  |
| Annual adviser fee          | Illustration sent to adviser   |
| Projection age              | Illustration saved   |

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Relay UK service on 18001 0131 226 9535.



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www.nucleusfinancial.com

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