



Request to receive income from flexible drawdown fund

This form allows you to request an income from your flexible drawdown fund. Please see our website and Retirement Factsheet 3 for more details.

SECTION A: PERSONAL DETAILS

PLEASE USE CAPITAL LETTERS

Surname	Title
First name(s)	Membership Number
Telephone Number	

SECTION B: AMOUNT OF INCOME

I want to receive a lump sum of:	a) Specific amount £
	b) Entire fund
I want to receive a monthly income of:	c) Monthly £

SECTION C: INVESTMENT OPTIONS

Your income will be taken from the selected funds in the proportions below.

*If you are not taking all of your funds, please specify where you would like to disinvest from: Please see your quotation or visit your Cheviot Dashboard for the investment options that you hold NB If this is left blank we will disinvest proportionately across all your investments	Cheviot Growth	%
	Cheviot Moderate	%
	Cheviot Low Cost	%
	Cheviot Cautious	%
	Cheviot Annuity Planning	%
	Cheviot Cash	%
	Legal & General World Equity Index Fund	%
	Legal & General UK Equity Index Fund	%
	Blackrock Aquila Connect Emerging Markets Fund	%
	State Street As of Priced World TPI Climate Transition Index Equity Sub-Fund	%
	HSBC Islamic Global Equity Index Fund	%
	Legal & General FTSE4Good Developed Equity Index Fund	%
	Total	100%

Please read and sign the declaration overleaf

SECTION D: PAYMENT DETAILS

PLEASE USE CAPITAL LETTERS

Name of Bank	Sort Code
Account name	Account Number

*Overseas bank accounts will incur additional charges- details provided upon request

SECTION E: DECLARATIONS

1.	I have considered my retirement options, the risk warnings and am aware of the free and impartial advice service provided by the Government called Pension Wise.
2.	I confirm I have had the opportunity to take independent financial advice and have carefully considered the implications of taking this income.
3.	I understand that if I access taxed flexible drawdown income, future contributions made by me or my employer to a money purchase arrangement will be subject to an annual allowance of £10,000.
4.	I authorise the Trustee to deduct any tax due.
5.	I confirm I understand the administration charges due and authorise the Trustee to deduct them from my funds.
6.	I acknowledge that the information on this form is held and processed by The Cheviot Trust, my employer and organisations providing services for the purposes of administering the scheme, in accordance with the Data Protection Act 2018 and the General Data Protection Regulation. Further details about how we use your personal data can be found in our Privacy policy which is available at www.mycheviotpension.com/privacypolicy
7.	I confirm I have read and understood the terms relating to the designation of all or part of my funds and the lump sum payment request.
8.	I agree to be bound by the Trust Deed and Rules as amended from time to time.
9.	I confirm that when I decide to take an income, I will contact you at least two months in advance to arrange payment.
We will process your request on receipt of this form unless you indicate a future date here:	
Signature:	Date:

Please complete this form and return to the following address:

The Cheviot Trust, Kingswood House, 58 – 64 Baxter Avenue, Southend-on-Sea, Essex SS2 6BG
T. 01702 354024 E. people@cheviottrust.com W. www.mycheviotpension.com