

With Compliments



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TAG Wealth Management is an appointed representative of Intrinsic Financial Planning Ltd and Intrinsic Mortgage Planning Ltd, which are authorised and regulated by the Financial Conduct Authority

Partners: D.Thompson MIFS DipFA, A.R.M.Young MIFS DipFA

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name:** Matlock Ford Directors Pension Scheme

**Member Name:** John Green

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

**Required Benefits**

- ~~1. I wish to draw all of my fund in Tax Free Cash and Income~~
- ~~2. I wish to vest segments and take as Tax Free Cash and Income~~
- ~~3. I wish to vest sufficient funds to provide a Tax Free Cash amount of £60,000~~
- ~~4. I wish to vest sufficient funds to provide an annual Income amount of £~~

Other (please detail)

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme)?

Yes

If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

Date: \_\_\_\_\_

What is the percentage of the SLA used up under those earlier Benefit Crystallisation Events that occurred under any other Registered Pension Scheme you are (or were) a member of, as recorded on your latest scheme statement(s). Copy statement(s) **MUST** be attached.

**Name of Registered Pension Scheme**  
**% SLA**

Signed: 

Date: 23/9/2015.