

Transitional Tax-Free Amount Certificate Application Form

This form can be used to apply for a Transitional Tax-Free Amount Amount Certificate.

To provide a Transitional Tax-Free Amount Amount Certificate, we need full evidence of every Benefit Crystallisation Event completed by the client. If we don't receive complete evidence, we cannot accept the application or provide a certificate. Find out more about Benefit Crystallisation Events in the <u>Government's Pensions Tax Manual.</u>

Investor Details
Client number:
Salutation:
Forename(s):
Surname:
National Insurance number:
Date of birth (dd/mm/yyyy):
Notes
 You can apply for a Transitional Tax-Free Amount Certificate from 6 April 2024. According to the relevant legislation, we have 90 days to supply the certificate.
• If you only have pre-commencement pensions (benefits taken pre - 6 April 2006), and no benefit crystallisation events since, you are not eligible to apply for a Transitional Tax-Free Amount Certificate.
• If you apply for a certificate and it shows a lower remaining lump sum allowance and/or a lower remaining lump sum and death benefit allowance, it's not possible to revert to using the standard calculations for both transitional lump sum allowance and transitional lump sum and death benefit allowance.
• Please note that once the certificate has been issued, if at any point we determine that the information provided below is inaccurate, we reserve the right to cancel the certificate by issuing a notice of cancellation.
• You cannot apply for a Transitional Tax-Free Amount Certificate if a relevant benefit crystallisation event (RBCE) has taken place after 5 April 2024.
Declarations
I confirm that no Relevant Benefit Crystallisation Event (RBCE) has occurred after 5 April 2024.
I have regular crystallisation events that I want to pause until after I receive the Transitional Tax-Free Amount Certifica
I have not applied for a Transitional Tax Free Amount Certificate with another scheme.



Benefit Crystallisation Event History

Please complete the table below for every Benefit Crystallisation Event (BCE) conducted before 6 April 2024.

Date of BCE	For any BCE 6 ('relevant lump sum'), please indicate if it was a serious ill-health lump sum.	Scheme	Lifetime Allowance Protection* (if applicable)	Lifetime Allowance utilised	Tax-free payment received (if applicable)	Evidence attached

If you have more events than fit into the above table, please provide this on a separate sheet.

If you have Lifetime Allowance protection, please also provide a copy of your protection certificate.

For every Benefit Crystallisation Event (other than those events with Wealthtime Select) listed in the above table, we require clear evidence of:

- Lifetime Allowance percentage used.
- · Tax-free lump sum paid.

This can be provided in any of the following formats. You may need to provide more than one document for each event:

- Benefit Crystallisation Event Statement.
- Bank Statement showing the tax-free lump sum amount(s) received.
- Any other form of statement from the pension provider detailing the information.

We reserve the right to request more information to clarify any events where the details provided are unclear.



Declaration

- I declare that the information in this form is true and correct to the best of my knowledge.
- I agree to indemnify Wealthtime Select against all claims or losses, including additional tax charges and fines, in the event the information provided proves to be incorrect.
- I understand that checks may be performed to confirm that the details are correct.

Name:				
Date (dd/mm/yyyy):]
Signature:				

If you require this document in an alternative format please contact us.

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