

[Change Password](#)[Help](#)[Log Off](#)[Accounts](#)[Transactions](#)[Reports](#)**Account Holder Details**[Previous](#)[Locate](#)[Next](#)

Account Holder Details		Accounts	Related
Account Holder Reference	000064000GLENNBROOKS		Bank Balance 26,604.69
Account Holder Name	The GBC Pension Scheme		Ledger Balance 26,604.69
Account Number	VIR11223320009648		Forward Balance 26,604.69
Account Type	CLG - Client G		Available Balance 26,604.69
Account Currency	GBP - Sterling		

Transactions	Forward	Statements	Interest
Statement Ending: <input type="text" value="Please Select Item"/> <input type="button" value="GO"/>			

£ 26,604.69 Account balance.

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- £4,000.00 Gross Income

£22,604.69 Remaining.

£3,200 net income - paid 06/10/2017

£800 PAYE - PAID 11/10/2017

Protection

This section only applies where you have registered with HM Revenue & Customs for protection, or have a protected pension age (for example you are able to commence benefits before age 55).

Have you registered for any type of protection?

Yes/No

If yes please provide a copy of your certificate

Do you have a protected pension age?

Yes/No

If yes, please confirm the protected pension age:

Lifetime Allowance

If you have registered for transitional of fixed protection and have crystallised benefits with another provider, please complete the information below. We will also require a copy of your protection certificate.

Date benefits crystallised

Value at crystallisation

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

If you have already used your full lifetime allowance and want to take further benefits tax charges will apply. Please confirm if:

A. The value of your benefits above the lifetime allowance should be paid as a lump sum, subject to 55% tax ☐

OR

B. Retained in your SSAS, designated to drawdown and subject to a 25% tax charge ☐

OR

C. Not Applicable ☐

Income Payments

Please confirm the amount of income you require (one only), the frequency of payments and whether this is payable in advance or arrears.

Amount:-	Nil <input type="checkbox"/>	Maximum <input type="checkbox"/>	Specified Amount (£) <input type="text" value="4000"/>
Frequency:-	Monthly <input checked="" type="checkbox"/>	Quarterly <input type="checkbox"/>	Annually <input type="checkbox"/>
Timing:-	Advance <input type="checkbox"/>	Arrears <input type="checkbox"/>	

Payment Details

In order for your benefits to be paid, please provide your bank details below:

Bank Name:	<input type="text" value="SANTANDER"/>		
Bank Address:	<input type="text" value="ABINGDON"/>		
Account Name:	<input type="text" value="MR S BLOALS"/>		
Account Number:	<input type="text" value="87761123"/>	Sort Code:	<input type="text" value="09-01-28"/>

HMRC – PAYE Payment details

Once Kath has given you a payslip make payment to ...

HMRC

08-32-10

12001039

Ref: 120PS00791908 (This reference must be included on payments or HMRC won't be able to allocate it!)

Ref: 120PS007919081807 — Added to ref: '18 tax year
'07 tax month.

As confirmed by HMRC.