For adviser use only

nucleus

Pensions in drawdown illustration request form

Please complete the following sections in full and return to client.relations@nucleusfinancial.com.

Please note that this form should only be used for pension drawdown cases. Illustrations for pensions not in drawdown can be completed through the Nucleus platform. If you have any questions please contact your client relations manager who will be delighted to help.

Adviser firm

Adviser

Client name

Sex

Date of birth

Investment amount

Existing client or transfer

Asset charge (initial)

Asset charge (annual)

Additional fund expenses

Initial fee

Trail fee

Projection age

PCLS required (n/a or percentage or amount)

Capped or flexi access drawdown

Already in drawdown (please select) Yes ☐ No ☐

If already in drawdown, last mandatory review date

If already in drawdown, current max GAD figure

Income required

Frequency of income

Additional comments

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Illustration request form checked

Illustration prepared

Illustration sent to adviser

Illustration saved (Share>10>Clients>Drawdown illustrations)