

# Maximum Drawdown Income

All details are input in Light Blue boxes

1. Input client's name, sex & date of birth

2. Input retirement date/ last review date  
Will calculate age attained at this date

3. Input pension fund at this date.

4. Select whether PCLS of 25% payable.  
If no, line appears to input amount of PCLS to be paid.  
Will calculate net fund available to provide DD income

These figures show that at retirement / review date;

- The GAD yield & GAD rate, and
- Maximum income that can be paid

5. Select whether want to compare previous DD income.  
If Yes, further lines appear for details to be input.

6. Input year of previous review, and Drawdown fund at that date  
Will calculate age attained at this date

These figures show that at next review;

- The GAD yield & GAD rate, and
- Maximum income that can be paid

Name	Mr X	
Sex	Male	▼
Date of Birth	09/04/1960	
Retirement (or Review) date	09/04/2024	
Age Attained	64	
Pension Fund	200,000	
PCLS 25%?	No	▼
If No, PCLS amount	0	
Drawdown Fund	£200,000	
Compare previous DD income?	Yes	▼
Previous review date	9 4 2021	
Age Attained	61	
Drawdown Fund	200,000	

  

GAD yield	4.25%
GAD rate	66
Maximum Income	£19,800

  

GAD yield	1.00%
GAD rate	41
Maximum Income	£12,300

  

**The maximum annual income at the next annual review will increase by 61.0%**

Explains impact on maximum income since previous review date