

Retirement Wrappers Template

	Client
Name	
Sex	M / F
Date of Birth	__ / __ / __
Taxpayer in UK or Scotland	

Assets	
Uncrystallised Pension Fund	£
ISA Portfolio	£
Collective Portfolio	£
Onshore Investment Bond	£
Offshore Investment Bond	£

Pre Retirement Funding	
Annual pension contribution	£
Pension growth rate	%

VESTING PENSION BENEFITS

Income	Amount
State Pension	£

Retirement Age	
Other non-savings income	£
Increase	%

Inflation	%
Show Inflation adjusted?	No / Yes

Pension Benefits	UFPLS	DRAWDOWN
Pension Vesting Age		
Fund to be crystallised	£	£
PCLS		£
% of GAD income, or		%
Amount		£

Step Up/Step Down?	UFPLS	Drawdown
At age		
Change?	Remain/Change	Remain/Change
Amount	£	£

Investments

Pre Retirement	ISA	Collective	Onshore	Offshore
Regular amount or Max	Amount / Max			
Regular Annual cont.	£	£		
Transfer to ISA each yr?		Yes / No		
Contribution increase	%			
Type of Units		Inc / Acc		
Income return		%		
Capital/Growth rate	%	%	%	%

VESTING INVESTMENTS

Vesting Age				
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Benefits	ISA	Collective	Onshore	Offshore
Rebase?			Yes / No	Yes / No
Income	£	£	£	£
Increase/reduce p.a.	%	%	%	%

Step Up/Step Down?	ISA	Collective	Onshore	Offshore
At age				
Change?	Remain/Change	Remain/Change	Remain/Change	Remain/Change
Amount	£	£	£	£