

ARDAN SIPP ILLUSTRATION REQUEST

Financial adviser firm	
Adviser name	
SIPP product name	The Ardan SIPP
Client's full name	
Title (Mr, Mrs, Ms, Dr, etc.)	
Male/Female	
Date of birth (dd/mm/yyyy)	
Marital status	
Selected retirement age (between 55 and 75)	
Transfer in fund value (£)	
Transfer in source	
Single contribution value (£)	
Regular contribution value (£)	
Regular contribution frequency	
Investment split - standard assets (%)	
Investment split - cash (%)	
(if required) Immediate benefits - lump sum (£ or %)	
(if required) Benefits - regular income (£)	
(if required) Benefits - regular income frequency	
Drawdown - is transfer-in fund in drawdown?	Yes ☐ No ☐
Drawdown - start date of drawdown (dd/mm/yyyy)	
Drawdown - last review date (dd/mm/yyyy)	
Drawdown - is this flexi/capped/full/partial?	Flexi ☐ Capped ☐ Full ☐ Partial ☐
Drawdown - maximum GAD (£)	
Drawdown - current income per annum (£)	
Drawdown - current income frequency	Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly ☐
Initial adviser fee (£ or %)	
Ongoing adviser fee per annum (£ or %)	
Investment Platform Fee	As per the Ardan SIPP Fee Schedule