

Transitional Tax-Free Amount Certificate Application Form

To provide a Transitional Tax-Free Amount Certificate, we need full evidence of every Benefit Crystallisation Event completed by the client. If we don't receive complete evidence, we cannot accept the application or provide a certificate. Find out more about Benefit Crystallisation Events in the [Government's Pensions Tax Manual](#).

Investor Details

Client number:	<input type="text"/>
Salutation:	<input type="text"/>
Forename(s):	<input type="text"/>
Surname:	<input type="text"/>
National Insurance number:	<input type="text"/>
Date of birth (dd/mm/yyyy):	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Notes

- Once you have applied for a Transitional Tax-Free Amount Certificate and provided all the required supporting evidence, we have 90 days to supply the certificate.
- If you only have pre-commencement pensions (benefits taken pre - 6 April 2006), and no benefit crystallisation events between 6 April 2006 and 5 April 2024, you are not eligible to apply for a Transitional Tax-Free Amount Certificate.
- If you apply for a certificate and it shows a lower remaining lump sum allowance and/or a lower remaining lump sum and death benefit allowance, it's not possible to revert to using the standard calculations for both transitional lump sum allowance and transitional lump sum and death benefit allowance.
- Please note that once the certificate has been issued, if at any point we determine that the information provided below is inaccurate, we reserve the right to cancel the certificate by issuing a notice of cancellation.
- You cannot apply for a Transitional Tax-Free Amount Certificate if a relevant benefit crystallisation event (RBCE) has taken place after 5 April 2024.

Declarations

- I confirm that no Relevant Benefit Crystallisation Event (RBCE) has occurred after 5 April 2024.
- I have regular crystallisation events that I want to pause until after I receive the Transitional Tax-Free Amount Certificate.
- I have not applied for a Transitional Tax Free Amount Certificate with another scheme.

If you have Lifetime Allowance protection, please also provide a copy of your protection certificate.

For every Benefit Crystallisation Event (other than those events with Wealthtime Classic) listed in the above table, we require clear evidence of:

- Lifetime Allowance percentage used.
- Tax-free lump sum paid.

This can be provided in any of the following formats. You may need to provide more than one document for each event:

- Benefit Crystallisation Event Statement.
- Bank Statement showing the tax-free lump sum amount(s) received.
- Any other form of statement from the pension provider detailing the information.

We reserve the right to request more information to clarify any events where the details provided are unclear.

Declaration

- I declare that the information in this form is true and correct to the best of my knowledge.
- I agree to indemnify Wealthtime Classic against all claims or losses, including additional tax charges and fines, in the event the information provided proves to be incorrect.
- I understand that checks may be performed to confirm that the details are correct.

Name:

Date (dd/mm/yyyy):

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Signature:

If you require this document in an alternative format please contact us.

Wealthtime Classic is a trading name of Wealthtime Limited. Wealthtime Limited is a private limited company registered in England & Wales. No. 06016480. Registered Office: 1 London Road Office Park, London Road, Salisbury SP1 3HP. Wealthtime Limited is authorised and regulated by the Financial Conduct Authority. FCA Number 468461.