

Transitional Tax-Free Certificate Application Form

This form can be used to apply for a Transitional Tax-Free Certificate.

To provide a Transitional Tax-Free 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 [Governments Pensions Tax Manual](#).

Investor Details

Investor number:

Forename(s):

Surname:

National Insurance number:

Date of birth (dd/mm/yyyy):

Notes

- You can apply for a Transitional Tax-Free Certificate from 6 April 2024. According to the relevant legislation, we have 30 days to supply the certificate.
- If the Investor only has pre-commencement pensions (benefits taken pre-6 April 2006), and no benefit crystallisation events since, they are not eligible to apply for a Transitional Tax-Free Certificate.
- If a certificate is applied for and the certificate shows a lower remaining lump sum allowance and or a lower lump sum death benefit allowance, it is not possible to revert to using the standard calculations for lump sum and lump sum 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 and issue you a notice of cancellation.
- A Transitional Tax-Free Certificate cannot be applied for if a Relevant Benefit Crystallisation Event (RBCE) has taken place after 5 April 2024.
- You are only allowed to apply for one Transitional Tax-Free Certificate. If you believe a previously applied for certificate is inaccurate, that certificate needs to be cancelled before you can apply for another one.

Declarations

I confirm that I have not taken any Relevant Benefit Crystallisation Events (RBCEs) after 5 April 2024.

I have regular crystallisation events that I want to pause until after I receive the Transitional Tax-Free Certificate.

I have not applied for a Transitional Tax Free Certificate with another scheme.



Benefit Crystallisation Event History

Please complete the below table for every Benefit Crystallisation Event (BCE) ever conducted:

If you have more events than fit into the above, please provide this on a separate sheet.

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) listed in the above table we require clear evidence of:

- Lifetime Allowance percentage used.
- Tax free cash 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 amount of tax-free cash 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 against all such 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 on this instruction to confirm details are correct.

Name:

Date (dd/mm/yyyy):

Signature:

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

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