

LV= Adviser Portal

Request submitted on Adviser Portal

Form Name	Adviser Portal SIPP Drawdown
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Product	PensionAdmin
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Date Time	12 May 2025 13:51:29
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Subject	SIPP Drawdown
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User Details

User role	Internal
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Name	J, Marshal
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Email	Marshal.J@lv.com
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Policy Holder Details

Title	Mr
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First name	Adam
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Surname	Betts
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Product	Self Invested Personal Pension
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Policy number	602171TEST
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Address 1	139 Churchill Way, Burton Latimer, Northants,
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Post code	NN15 5RT
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Telephone number	07720030189
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LV= Adviser Portal

Email address adambetts139@yahoo.com

Date of birth 1965-09-02

New Details

Request Type Change in Regular Income

What should your client's new level of regular income be? 50,000.00

Do you want the benefits to come from the same funds as any existing income arrangements on this plan? NO

Risk Questions

Have you given your client financial advice relating to this request? YES

Other Questions

Have you taken benefits from any pension scheme other than the LV= pension plan or their state pension?

Please enter the HMRC reference number for the Protection you'd like us to use

Please enter your client's HMRC scheme administrator reference

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Investment Details

Which investments should be sold to pay the selected benefits The Prudential Assurance Company Limited (9930934002) - 100%

Which LV Insured Funds should be sold to pay the selected benefits

Bank Details

Where your client would like their money to be paid TSB ****2346

Regular Contribution

Would you like to continue or stop paying in regular contributions I would like to continue

Fee Details

Are you charging a fee for this request NO