

# REQUEST TO CONVERT CAPPED DRAWDOWN ARRANGEMENT TO FLEXI ACCESS DRAWDOWN ARRANGEMENT

Adviser Firm:

Adviser:

Portfolio:

Client Name:

Sub Account to be converted:

In order for the sub account to be converted, please check there are no

in progress Income Payments

in progress trades

in progress corporate actions

in progress wizard for the Capped Drawdown sub account

## Declarations

You have selected to convert the Capped drawdown arrangements shown above to Flexi-access drawdown. Once submitted, this process cannot be reversed and no cancellation rights will apply. You should only submit this instruction once you have agreement from your client to proceed.

On completion of this conversion, your client will receive Summary of Retirement Account changes, Illustration and Charges information documents.