

Webinar FCA RID – REP016



This is a refresher session, designed for those who are experienced in the use of the technology platform and the FCA Retirement Income Data REP016 functionality.

The webinar content will concentrate on the SIPP~Pro submission, with any SSAS~Pro specific logic being discussed.

Topics to be covered are listed below.

Topic	Include
FCA RID REP016	Reporting Requirements & FCA Guidance
Setting up the reports	Set Parameters Select Schemes Download CSV
Report Questions	Q4 – Active Members aged 55 & over Q5 – Active Members aged 55 & over who have taken UFPLS Q6 – Active Member aged under 55 Q8 – Total Value of Uncrystallised Funds Q9 – Members in Partial Drawdown aged over 55 Q10 – Number of Members who are fully Crystallised Q11 – Number of Drawdown Members who have only taken PCLS Q12 – Total Value of Crystallised Funds Q15 – Number of Members in receipt of regular withdrawals by Drawdown or UFPLS (reference to Q18 – Q31) Q16 – Number of Members in receipt of ad hoc withdrawals by Drawdown or UFPLS (reference to Q32 & Q33) Q17 – Total Value of regular withdrawals split by age band Q18 to Q22 – Results for Q17 split by annual rate of withdrawal Q23 to Q24 – Results for Q17 split by use of advice and age band Q25 to Q29 – Results for Q17 split by annual rate of withdrawal and pot size Q30 to Q31 – Results for Q17 split by use of advice and pot size Q32 – Total Value of ad hoc withdrawals split by pot size Q33 – Number of Members taking ad hoc withdrawals split by pot size