

The Hartley SIPP Transfer in Form

Title: Surname:

Forenames:

SIPP Scheme Number:

Please accept this form as my instruction to transfer the following pension arrangement to my Hartley SIPP.

Transferring Scheme Details

Name:

Reference:

Address:

Postcode:

I wish the transfer to be on the following basis:

Transfer Method:

Please only tick ✓ one box

Cash Transfer

With this option your existing provider will sell your current holdings and transfer the cash proceeds. If you want to transfer your holdings intact, please select the In Specie option.

In Specie Transfer

Transferring an asset 'in specie' means transferring your underlying holdings as they are, without having to sell and repurchase them. This means you will remain invested throughout the transfer process and your holdings remain intact. You should note, however, that there will be a short period when you cannot sell your holdings.

Transfer Amount:

Please only tick ✓ one box

Full Transfer

With this option you will transfer the entire value of your existing pension.

Partial Transfer

With this option you will only transfer part of your pension rights in a registered pension scheme, leaving the remaining rights in your existing scheme.

Please specify amount to be transferred:

Please indicate with a tick ✓ all that apply:

Retirement Annuity:

Buy out 'S32':

Self Invested Personal Pension:

Statutory scheme:

Small Self Administered Scheme:

Personal Pension:

Free standing AVC:

Defined Benefit Occupational Scheme:

Defined Contribution Occupation Scheme:

Does the transferring scheme have any safeguarded benefits

Yes

No

If the transferring scheme is either a defined benefit scheme or has any form of 'safeguarded benefits' then full regulated advice will be required before the transfer can be accepted. Please refer to the Transfer guidance notes for further details.

Please return completed form to:

The Hartley SIPP c/o The Lifetime SIPP Company Ltd 25 Marsh Street, Bristol BS1 4AQ

The Lifetime SIPP Company Ltd is authorised and regulated by the Financial Conduct Authority 464526. Registered in England and Wales No 02455807

T 0117 316 9944 E info@thelifetimesipp.com W www.thelifetimesipp.com

Please confirm the following with a tick ✓ as appropriate:

- 1 (a) I have not received any benefits from the transferring scheme
- OR (b) I attach a statement of benefits I have received from the transferring scheme
- 2 If the transfer is from a scheme with a retirement age below 55, I attach a certificate showing the age at which benefits may be taken.
- 3. I intend to immediately draw benefits from the proceeds of this transfer

I understand The Hartley SIPP may use a third party to request the transfer of the above arrangement and I give my authority for them to release any information in respect of this transfer to the appointed third party.

It is a serious offence to make false statements and doing so could lead to prosecution.

Signed: Dated:

Letter of Authority

Client Address:

Postcode:

To whom it may concern:

In respect of pension arrangements made on my behalf now or at any time in the past, I

Title: Surname:
Forenames:

I hereby authorise any competent person to provide information relevant to my pension arrangements to The Lifetime SIPP Company Limited, on presentation of this letter or a facsimile of it

Signed: Dated:

Please return completed form to:

The Hartley SIPP c/o **The Lifetime SIPP Company Ltd** 25 Marsh Street, Bristol BS1 4AQ

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