

The Hartley SIPP Expression of Wishes Form

Under the provisions of The Hartley SIPP any payments due on the death of a member are made at the discretion of the scheme's trustee, The SIPP Trustee Company Limited as directed by the scheme administrator. In order that the scheme administrator is aware of the member's wishes, you are requested to complete this Expression of Wishes form. Details of your intended beneficiaries can be changed at any time by you completing a new form to replace earlier instructions.

The amounts payable on death can be very valuable so it is important that members consider what their wishes are. Also, it is recommended that such statements at regular intervals, particularly when there is any change in personal circumstances.

The member:

Title: **Surname:**

Forenames:

Scheme Number:

I understand that the scheme administrator, **The Lifetime SIPP Company Limited** has absolute discretion as to how to direct the trustees in the payment of any lump sum and/or spouse's/dependant's income from my Hartley SIPP arrangement in the event of my death. However, if and when the scheme administrator exercises its discretion, I would like it to take into account that my wishes as to how benefits should be paid are as stated below. I understand that I can cancel or change this statement at any time.

Full name of person I wish to benefit	Relationship to me	Address	Proportion/Order of preference

Notes:

1. If you wish to choose a person(s) who you would like to benefit only if your other proposed recipients have died before you, please explain this. (For example, spouse/partner 100%, or if they die before you, children in equal proportions.)
2. Under no circumstances should your signature on this form be witnessed.

Signed:

Dated:

Please return completed form to:

The Hartley SIPP c/o **The Lifetime SIPP Company Ltd**
Broad Quay House, Prince Street, Bristol BS1 4DJ

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