

The Hartley SIPP

Expression of wishes Form – Post Drawdown Event

Under the provisions of The Hartley SIPP any payments due on the death of a member after drawing benefits must be paid out by the scheme's trustee, The SIPP Trustee Company Limited. Whilst not bound to follow them, the scheme member may express their wishes as to how the funds should be distributed upon death through instructions given by the member and 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. The scheme administrator also recommends that members review such statements at regular intervals, particularly when there is any change in personal circumstances.

The member:

Title: **Surname:**

Forenames:

Scheme Number:

I understand that following my drawing of benefits the Trustees must settle the benefits payable on my death in line with my wishes, which are as stated below. I understand that I can cancel or change this statement at any time.

(1) Spouse's/Dependant's Pension to:

(2) If there is no surviving spouse/financial dependant, then the funds should be paid out as:

Either (a) a lump sum (less the appropriate tax charge) to the following beneficiary/ies:

Or (b) a tax free lump sum to the following Registered Charity:

Notes:

1. Any lump sum payment under 2(a) above is subject to the deduction of tax at your beneficiary/ies to suffer these tax charges, you can nominate a tax free Charity.
2. If you do not nominate a Registered Charity as an alternative to a payment under surviving beneficiary/ies, then the scheme administrator will direct the trustees Registered Charity of its own choice.
3. 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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