

The Hartley SIPP Retirement Request Form

Member Name:

Scheme Number:

Please take this form as my instruction to calculate and pay out benefits from my Hartley SIPP based on the following fund value:-

Assets as at / / 20 (please complete, the asset value below must be at this chosen date)	Value £
SIPP Bank Account with RBS/Cater Allen (please delete as appropriate)	
Investment with	
Investment with	
Less IFA/SIPP fees	
Total asset value	

Type of Retirement:

- Capped drawdown** – A regular income calculated using your age and the Gilt Yields and Government Actuary Department (GAD).
- Flexible drawdown** – Under Flexible drawdown you are not restricted to the maximum pension calculated under capped drawdown and can draw any level of income desired from your Hartley SIPP which is taxed via PAYE.
- Flexi Access** – Under this option you can take any amount of pension benefits as a lump sum or installments of your choice
- Annuity** – An annuity is a financial product which turns some or all of the money in your pension fund into an ongoing income in retirement. The Lifetime SIPP Company does not offer annuities. You will be required to transfer or all part of pension fund to an annuity provider to take this option.
- Uncrystallized Funds Pension Lump Sum payment (UFPLS)** – This is a one off payment of either your entire pension pot or a specified sum.

Amount of Pension Commencement Lump Sum (PCLS) required:

Maximum Fixed Amount

Following payment of the Lump Sum I intend to:

- Commence Pension Payments Amount – Maximum Fixed Amount
- Postpone Income payment from my SIPP
- Take all my remaining benefits in one lump sum

Please see the Payment of Benefit Guidance Notes available on our website for a full explanation of each option and a glossary of terms

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

HMRC Pension Protection

Please advise if you have registered for Protection with HMRC.

Enhanced Primary Fixed Individual Fixed 2014

Declaration

The Hartley SIPP recommends that before taking any retirement benefits independent financial advice is sought. If you do not have a financial adviser you can find one by going to www.unbiased.co.uk. You can also access free guidance through The Pension Advisory Service by visiting www.pensionwise.gov.uk

The liquidity of your investment may be such that it may not be possible to disinvest immediately. In this instance you do have the option of taking the benefits 'in specie'. 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. This option is only available to you if you have taken full financial advice and upon receipt of a third party valuation of your investments.

Signed by Member:

Date:

Please return completed form to:

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