

# The Hartley SIPP TV Out Request

To: The Hartley SIPP  
C/o Hartley SAS Limited  
62 Queen Square  
Bristol  
BS1 4JZ

Please accept this as my authority to make a Transfer from my Hartley SIPP to the following arrangement.

## Details of Receiving Scheme

<b>Name of Provider:</b>	<input type="text"/>
<b>Address:</b>	<input type="text"/>
<b>Telephone:</b>	<input type="text"/>
<b>Email:</b>	<input type="text"/>
<b>Policy Number:</b>	<input type="text"/>
<b>PSTR Reference No:</b>	<input type="text"/>

Please provide a copy of the HMRC PSTR certificate.

<b>Type of Scheme:</b>	<input type="text"/>
<b>Bank Name:</b>	<input type="text"/>
<b>Sort Code:</b>	<input type="text"/>
<b>Account Number:</b>	<input type="text"/>
<b>Account Name:</b>	<input type="text"/>
<b>Reference:</b>	<input type="text"/>

## Transfer Details

<b>Reason for Transfer:</b>	<input type="text"/>
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I wish the transfer to be on the following basis:-

### Full Transfer/Partial Transfer

If 'Partial Transfer' please specify the amount to be moved  £

### Cash Transfer/In specie Transfer

If an 'In Specie Transfer' please specify the assets to be moved:

Please sign Declaration on page 2

**Declaration**

I confirm that I have sought independent financial advice in respect of the transfer of my benefits from The Hartley SIPP from:

I can confirm that if I am transferring any investments 'in specie' that it is my responsibility to ensure that the receiving scheme will accept the transfer.

I understand that if my transfer of benefits includes Non Standard Assets (NSA) I will be required to take suitable financial advice as to the suitability of the transfer.

I understand that due to the implications of pension liberation the transfer of benefits may take up to six months to complete.

I confirm that I have not been offered a personal financial incentive to move my SIPP to a new provider.

I understand the receiving scheme may contact The Hartley SIPP in respect of my pension arrangement and give my authority for you to release information and deal direct with the receiving scheme with regards to the transfer only.

I am fully aware of the implications of the transfer.

I am aware of The Lifetime SIPP Company's transfer out charges of £200 + VAT for a Partial Transfer and £300 + VAT for a Full Transfer and that these fees are payable prior to the transfer being completed. I am also aware that full administration charges will apply to any benefits that are not transferred.

I am aware extra charges may be applied if Property and/or Deed of Assignment are involved with the transfer.

**Signed:**

**Print Name:**

**SIPP Scheme Number:**

**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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