



# THE HARTLEY SIPP

## CHECKLIST

Applicant Name  Date of Birth

Sent from

Date

**Please find enclosed the following:**

	Attached	To Follow	Not Required
Application Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transfer Authority Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contribution Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Specie Contribution Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expression of Wish Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Net Worth / Sophisticated Investor Declaration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Client Declaration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please indicate if a cheque is enclosed Yes  No  Amount  £

Notes

**Please return completed form to:**

Hartley Pensions Ltd, 5th Floor, 25 Marsh Street, Bristol, BS1 4AQ. Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 094695576. T:0117 316 9991 E: admin@hartleysas.co.uk W: www.hartleypensions.com

