



# FLEXI ACCESS DRAWDOWN CONVERSION FORM

## About this form

This conversion form should be used if you are:

- Converting your existing Capped Drawdown pension to a Flexi Access Drawdown pension
- Making a change to your income payment in Flexi Access

**Please return the completed form to: Hartley SAS Limited, SSAS Team, 8th Floor, 25 Marsh Street, Bristol BS1 4AQ.**

If you convert from Capped Drawdown to a Flexi Access Drawdown, and you subsequently withdraw any funds, you will become subject to the Money Purchase Annual Allowance (MPAA) rules from the date the money is paid to you. This means you will have a £10,000 annual allowance (tax year 2015/onwards) for money purchase pension savings. If in any tax year the total contributions to money purchase arrangements exceeds £10,000, there will be an annual allowance tax charge on the excess. You should inform all your pension providers (if any) that you are subject to the MPAA.

We recommend you speak to your Financial Adviser before making any changes to your existing Capped Drawdown pension.

## PART ONE - CONVERSION

I would like to convert my existing Capped Drawdown pension arrangements administered by Hartley-SAS to a Flexi Access Drawdown with immediate effect and have been informed and accept the new charging structure that is applied to Flexi Access Drawdown.

I am aware that I will be subject to the Money Purchase Annual Allowance (MPAA) rules as soon as I withdraw any funds from the Flexi Access Drawdown pension. Hartley SAS Limited will confirm this in writing.

I am also aware that I must report to the administrator of every other pension arrangement I have that I have flexibly accessed my benefits under the small self-administered scheme I have with Hartley SAS Ltd and the date I did so.

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Dr <input type="checkbox"/>	Other	<input type="text"/>
Surname	<input type="text"/>			Other Names	<input type="text"/>	
National Insurance Number	<input type="text"/>					

## PART TWO - INCOME & PAYMENT CHARGES

### Regular Income

Please state the amount of gross annual income you want to draw  per year

Monthly  Quarterly  Half Yearly  Yearly  Start Date

### Ad hoc payments

Please state the amount of the ad hoc payment you would like made to you



## PART TWO - INCOME & PAYMENT CHARGES (CONTINUED)

Any additional instructions regarding raising a cash balance within your pension pot under the SSAS to fund the chosen income.

You should allow at least 10 working days from the date you send us the form for the change to take effect.

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## PART THREE - CHANGE OF BANK DETAILS

**Please give full details of where you would like payments to be made, if different to what we hold on file already.**

Bank/Building Society Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
Name in which the account is held	<input type="text"/>		
Sort Code	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>	Roll Number (Building Society)	<input type="text"/>
Account Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

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## DECLARATION

Are you already subject to the Money Purchase Annual Allowance (MPAA) rules? Yes  No

If yes, please advise the date you triggered the MPAA rules

The administrator of any other already accessed arrangements you have will have advised you on these points.

Please arrange for my Drawdown instructions to be applied, as detailed in this form.

Signature  Date



**Hartley Pensions Ltd**

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