



THE HARTLEY PENSION FINANCIAL ADVISER DECLARATION

DEFINED BENEFIT/SAFEGUARDED BENEFIT TRANSFER

Member Name

Adviser Name

Adviser FCA No

Company Name

Position in Company

Company FCA No

I can confirm that I hold suitable FCA permissions to provide financial advice for the transfer of the following named Defined/Safeguarded Benefit Scheme to The Hartley Pension and that the advice provided has been checked by a Pension Transfer Specialist.

Scheme Name

I can confirm that I hold a current Terms of Business with The Hartley Pension, and the advice given conforms to the terms set out by Hartley

OR

I enclose a copy of my Statement of Professional Standing

Signed

Date

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 09469576. T:0117 316 9991 E: admin@hartleysas.co.uk W: www.hartleypensions.com

