

TRANSFER OUT FORM

Hartley SAS Limited
SSAS Team
5th Floor, 25 Marsh Street
Bristol BS1 4AQ.
SSAS Name

Please accept this as our authority to transfer the following named SSAS:

| | |
|---------------|----------------------|
| SSAS Name | <input type="text"/> |
| Member's Name | <input type="text"/> |

Details of Receiving Scheme

| | | | |
|---------------------|----------------------|-------------------|----------------------|
| Name of Provider | <input type="text"/> | | |
| Contact at Provider | <input type="text"/> | | |
| Address | <input type="text"/> | | |
| | <input type="text"/> | Postcode | <input type="text"/> |
| Telephone | <input type="text"/> | Email | <input type="text"/> |
| Policy Number | <input type="text"/> | PSTR Reference No | <input type="text"/> |

Transfer Details

Reason for Transfer

I wish to transfer on the following basis:

Transfer Method:

Cash Transfer
With this option your existing provider will sell your current holdings and transfer the cash proceeds. If you want to transfer your holdings intact, please tick the 'In Specie' option.

In Specie Transfer
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. You should note, however, that there will be a short period when you will not be able to sell your holdings.

Transfer Amount:

Full Transfer
With this option you will transfer the entire value of your existing pension.

Partial Transfer
With this option you will only transfer part of your pension rights from another registered pension scheme, leaving the remaining rights in your other scheme.



Please specify amount to be transferred:

(Required for full and partial transfers)

Important Note: Where you are requesting an In Specie transfer it is your responsibility to check with the ceding scheme that assets can be transferred In Specie.

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

DECLARATION

We confirm that we have sought independent financial advice in respect of the transfer of my benefits from the above named SSAS from

Name of adviser

Address

Postcode

Telephone

Email

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

We confirm that we have not been offered a personal financial incentive to move our SSAS to a new provider.

We understand the new provider may contact Hartley SAS Limited in respect of our SSAS and give our authority for you to release information and deal direct with the receiving scheme with regards to the transfer only.

Signature

Print Name

Date



Please return this form to:

Hartley SAS Limited SSAS Team, 5th Floor, 25 Marsh Street, Bristol BS1 4AQ
T 0117 316 9991 E admin@hartleysas.co.uk www.hartleysas.co.uk