



Dawn Hutchings  
Director

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14 Furzeland Way  
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MR FRED IRVING

32 Wymeing rd,  
PORTSMOUTH

HANTS

POE 7HY

10-06-16

Hi Dawn

Here is the covering letter and  
form to transfer my funds

Fred Irwing

Mr E Lewis  
32 Wymering rd.,  
PORTSMOUTH  
HANTS  
PO2 7HY  
12-06-16

Scheme No:- 25586

Dear Sir

I am writing to confirm my  
wish to transfer funds from my  
lifetime SIP scheme No 25582  
to the Halfpenny and Spendoff  
LTD Executive Pension Scheme.

Yours Sincerely

J. Lewis

**Strictly Private & Confidential**

Mr F Irvine  
32 Wymering Road  
Portsmouth  
PO2 7HY

08 June 2016  
Our Ref: JB/25586

Dear Mr Irvine

**The Lifetime SIPP RE: Mr F Irvine**

I write further to your conversation with my colleague, Jade Williams, regarding your Lifetime SIPP. It has been brought to my attention that you would like to transfer your Lifetime SIPP to a new pension scheme; if this is the case then please provide written confirmation of this. Furthermore, I have enclosed a copy of the Lifetime SIPP Transfer Out Form which you will need to complete in order to arrange for the transfer to be processed.

I hope that the above is clear and helpful. However, should you have any questions regarding this, please feel free to contact me on 0117 316 9991, or alternatively on [jamesbolton@hartleysas.co.uk](mailto:jamesbolton@hartleysas.co.uk).

Yours sincerely,



**James Bolton**  
SIPP Administrator  
Hartley-SAS Ltd

# The Lifetime SIPP TV Out Request

To: The Lifetime SIPP Company Limited  
C/o Hartley SAS Limited  
25 Marsh Street  
Bristol BS1 4AQ

Please accept this as my authority to make a Transfer from my Lifetime 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"/>
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If the scheme is an Occupational Scheme or SSAS please also provide the additional information required on the final page of this form.

<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 Lifetime 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 Lifetime 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 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:

## Transfer Out Additional Information

If the receiving scheme is either a Small Self Administered Scheme (SSAS) or an Occupational Scheme, the following additional information is required:

1. A copy of the HMRC PSTR certificate
2. Certificate of the HMRC registered scheme administrator
3. Certified copy of the scheme's Trust Deed and Rules
4. Confirmation of the Trading Status of the sponsoring employer
5. Confirmation of the relationship of the transferring member and the sponsoring employer

Please be advised that, prior to any transfer, written validation of the receiving scheme will be sought from HMRC.

**Please return completed form to:**

**The Lifetime SIPP Company Ltd 25 Marsh Street, Bristol BS1 4AQ is authorised and regulated by the Financial Conduct Authority 464526**

Registered in England and Wales No 02455807

**T 0117 316 9944 E info@thelifetimesipp.com W www.thelifetimesipp.com**