

# BESTINVEST

<b>Date</b>	<b>26/11/2013</b>	<b>Our Ref</b>	<b>Laura Surtees</b>
<b>FAO SSAS Pension Transfers In</b> <b>Pension Practitioner.Com</b> <b>Daws House</b> <b>33-35 Daws Lane</b> <b>LONDON</b> <b>NW7 4SD</b>		<b>Bestinvest Wealth Management (Ltd)</b> <b>9/21 Princess Street</b> <b>Manchester</b> <b>M2 4DN</b>  <b>FSA No. 134190</b>	
<b>Department: SSAS</b>		<b>Your Ref SSAS PPTV IN</b>	
<b>Client Name</b>	<b>1850 SSAS</b>		
<b>Enclosed:</b>		<b>Required</b>	
X	SIPP Centre Transfer Out Discharge Form for David Smith to TV £15,000 in only. Please can you send to SIPP Centre with details of the bank account where the monies are to be sent.	X	Acknowledgement & copy once sent to SIPP Centre
			Investment Schedule
			Policy Documents
			Commission
			Confirmation of:
<b>FURTHER REQUIREMENTS</b>  <b>See attached documents signed by the individual for you to forward on to SIPP Centre so monies can be released to the SSAS.</b>  <b>THANKS</b>			

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## SIPPDEAL E-SIPP TRANSFER DISCHARGE FORM

Arrangement: Sippcentre SIPP  
Member: David Smith  
Account Number: SCC807093

**To be completed by the Member (Please complete all parts)**

Reason for transferring?  
(Please select all that apply)

Lower charges	<input type="checkbox"/>
Adviser recommendation	<input type="checkbox"/>
Consolidation	<input type="checkbox"/>
Greater flexibility	<input type="checkbox"/>
Other (please specify)	<input type="text"/>

Did you receive advice in relation this transfer? Yes / No (please circle)

If yes, from whom did you  
receive advice?  
(Please insert details)

Name
Address
Telephone number

How do you wish to transfer your assets?

CASH only

☒

IN-SPECIE

☐

Amount of transfer?

All of my fund ☐ or amount £ ~~10,000~~ 15,000

I hereby request you to transfer the amount specified above from the benefits to which I am entitled under the arrangement named above, and pay the transfer value to the receiving scheme stated below.

I declare that I am legally entitled to the benefits in question, which the arrangement secures. I agree that payment by you in accordance with these instructions will fully discharge A J Bell Management Limited and Sippdeal Trustees Limited from liability to provide benefits for me under the above arrangement, and I indemnify you against all claims or proceedings made against you in respect of the benefits to be transferred, and against all resulting losses and expenses, which you may incur.

I confirm that neither myself nor any party connected with me will be in receipt of any payment as a result of this transfer and its subsequent investment other than authorised pension and lump sum benefits, payable to me no earlier than from age 55.

Signed by the member in his/her capacity as member to the arrangement:



Dated 20 Nov 2013