


Retirement.Capital

CHAT

<NAME CLIENT>
PROFILE

Your SSAS

Current Value £ 10.000

Asset breakdown


Projected value
Based on your current value and contribution scheme, this provide you with a pension of:
Total value at retirement age <£ 88.000>
This amount could buy you:
A once of Tax free lump sum of <£ 30.000>
Plus an income at age 65 of: <£ 8.000 p/a>

Manage SSAS
Manage money & investmens

CONTRIBUTIONS

INVESTMENTS

TRANSFER

Manage details


BENEFICIARIES

CHANGE BANKACCOUNT

Request withdrawal

TAKE OUT

Click on the Transfer button to start the transfer process.








Retirement.Capital

CHAT


Transfer request

How pension transfers work

You can transfer in pensions from elsewhere to your SSAS via your dashboard through the following steps.

- 1  Select the type of transfer you wish to make.
- 2  Provide us with information about your pension
- 3  Inform us of your financial advice preference
Provide us with your financial advisor details or we will provide a financial advisor should you require one.
- 4  Initiate the transfer process
We will contact your financial advisor to start the transfer as well as keep you informed or provide you with administrative assistance should you not have a financial advisor.
- 5  You may repeat the process and transfer another pension

Please note that fund transfers can take up to 8 weeks to process

 Your old pension provider executes the transfers of funds
Deposit the funds into your SSAS

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START

The user is taken to the 'How pension transfers work' page.

Please provide the relevant text for each step in the process.



Transfer request Step 1

Please select the transfer type

Please note that if you have a pension from a public sector scheme or a pension annuity in payment, this cannot be transferred to your SSAS.

Cash Transfer. Transfer the cash equivalent value of another pension to my SSAS ☐

In-Specie Transfer. Re-register the investments from another pension to my SSAS (this will apply where for example, you have a SIPP share portfolio). ☒

If you are unsure which option to choose, please chat with a member of the support team, or request a call back.

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The user is presented with options.

Select 'In-specie Transfer'.

Click 'Next'



In-specieTransfer request Step 2

Please provide some information about this pension

1. Is the pension currently in payment?

☐ YES☐ NO

2. Who is the pension with at the moment

3. Name the assets you wish to transfer.

4. Provide and estimate of the cash value transfer amount

£

5. Please upload any documents or statements on this pension.

[Upload Documents](#)[<< BACK](#)[NEXT](#)

The user has to complete details about the pension.

Please refer to the comments in red on the image and advise.

Click on 'Next'.

Validation

Confirm if the value of each asset is required or only the total value of all the assets?

Please further confirm if the estimated value field is compulsory?

NB: We suggest listing the assets as in the 'Transfer your SSAS' process as these options already exist within the portal and vTiger. We would appreciate your feedback on this.



In-specie Transfer request Step 3

Please select a financial advice option

The user makes a selection and enters the necessary details.

Click 'Next'

☐ A. Please send me a quotation for the cost of financial advice to make this transfer.

☐ B. I have a financial advisor that will act on my behalf.

Please provide some advisor details

Name:

Email:

Phone:

☐ C. I do not require financial advice and will undertake the transfer on my own.

You can only choose this option if you do are not transferring in from a previous employer's final salary scheme.

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In-specie Transfer request Step 4

A: Financial advice quote

Please review the content on this page for updates

Click 'Continue' – Dashboard.

Option B: Financial advisor exists
Option C: Financial advisor does not exist

Thank you for this information, we will contact a financial advisor on your behalf to secure you the best terms, we will be in touch in the next 48 hours. In the meantime, we will start the data gathering process.

Outcome where B is chosen

Thank you for this information, we will contact your financial advisor to commence the transfer process. We will update you further once we hear back from your financial advisor.

Outcome where C is chosen

We have noted that you do not wish to take financial advice. You can only choose this option if your pension is not a final salary based scheme. On the basis that this pension is not final salary based, then we can provide you with administration assistance, but for regulatory reasons we cannot apply for the transfer on your behalf.

We will be in touch over the next 48 hours with the documents you will need to commence this process.

NB: There would only be one 'Continue' button with 2 different outcomes.

In-specie Transfer request Step 5

Please make a selection

☐ I wish to make another transfer

☐ I do not wish to make another transfer

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[CONTINUE](#)

Takes you back to stage 1.

[CONTINUE](#)

Takes you back to your dashboard



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TAKE OUT

Let's pretend that we have initiated 2 cash transfers and completed 1 In-specie transfer.

Click 'Transfers'.

Indicate the number of transfers in progress



Your Transfers

Transfer from Hargreaves

Start Date	13/11/2018
Type	Cash
Status	Pending

Transfer from XYZ

Start Date	18/11/2018
Type	Cash
Status	Pending

Transfer from NPQ

Start Date	8/11/2018
Type	In-Specie
Status	Completed
Completed Date	22/11/2018
Transferred value	£ 782 100

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MAKE ANOTHER TRANSFER

The user may view the pending transaction details as well as completed transfers.

Please review the content on this page with regard to what should be displayed for **pending** and **completed** 'Cash' and 'In-specie' transfers.

Display assets and the value per asset?

Advisor details?