

# Transfer from a scheme offering safeguarded benefits

If you are transferring a pension with safeguarded benefits over £30,000 you **must** complete this form. Safeguarded benefits include, but are not limited to, defined benefit or 'final salary' pensions and Guaranteed Minimum Pensions.

Please check your policy documents very carefully prior to requesting a transfer to a Dentons SSAS as your transfer could be delayed or rejected if these are identified at a later date.

If you don't have an existing SSAS we will only consider a transfer where the funds are £50,000 or above.

**The first section must be completed by the Pension Transfer Specialist and the second section by you.**

## Section 1: For completion by the Pension Transfer Specialist

Client name

Name of transferring scheme

Plan number

Pension Transfer Specialist Name

Name of Firm

Adviser Company FRN

Proposed investments

As part of the transfer advice, what specific investments have you recommended for the transfer funds to be invested in?

**I confirm in respect of the proposed transfer from the above scheme that:**

- > I have provided the above named applicant with advice in respect of the transfer and proposed investments referenced above
- > I have recommended that the application proceeds with this transfer
- > I am qualified to provide financial advice in respect of safeguarded pension transfers, as defined by the FCA permissions to provide advice on pension transfers and opt outs
- > I understand that Dentons requires a minimum of 7 working days prior to the transfer expiry deadlines to process this transfer.

**Pension Transfer Specialist Signature**

**Date**

## Section 2: For completion by the Client

I confirm in respect of the proposed transfer from the above scheme that:

- > I have received regulated pension transfer advice from the pension transfer specialist named above
- > I have understood the advice that I have been given in respect of this transfer
- > I agree that the acceptance or rejection of a safeguarded benefit transfer is at the discretion of the SSAS trustees
- > I also acknowledge that the acceptance or rejection of any proposed investment to be held within the Dentons SSAS is at the discretion of the SSAS trustees
- > I understand that Dentons requires a minimum of 7 working days prior to the transfer expiry deadline to process this transfer
- > I confirm I wish to proceed with this transfer to a Dentons SSAS.

**Client signature**

**Date**



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