

Transfer from a scheme offering safeguarded benefits - SSAS

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 benefitor '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	<input type="text"/>
Name of transferring scheme	<input type="text"/>
Plan number	<input type="text"/>
Transfer Expiry Deadline	<input type="text"/>
Pension Transfer Specialist Name	<input type="text"/>
Name of Firm	<input type="text"/>
Adviser Company FRN	<input type="text"/>
Proposed investments As part of the transfer advice, what specific investments have you recommended for the transfer funds to be invested in?	<input type="text"/>

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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