



YORSSAS

SSAS Transfer In Application

Please complete this form when transferring benefits from a UK Registered Pension Scheme. Please complete a separate form for each plan/scheme.

SSAS Name

Member Details

Member Name

Address

Postcode

Date of Birth Member No (if known)

Transferring Scheme Details

Transferring Scheme Name (the current provider)

Transferring Scheme Address

Postcode

HMRC Pension Scheme Tax Reference (PSTR) number

Transferring Scheme Policy No.

Transfer Details

Complete for a Full Transfer:

Estimated total transfer value

£

of which represents Uncrystallised Funds

£

of which represents Crystallised Funds

£

Complete for a Partial Transfer:

Exact value to be transferred

£

of which represents Uncrystallised Funds

£

of which represents Crystallised Funds

£

(If a partial transfer includes crystallised funds then all of the crystallised funds must be included in the transfer, i.e. only uncrystallised benefits will remain in the Transferring Scheme.)

Are any assets being transferred 'in specie'?

☐ Yes

☐ No

If Yes, please provide details of the assets below, or attach a separate schedule. If the assets to be transferred include commercial property, please complete the SSAS Property Purchase Questionnaire which is available on request or from our website: <http://www.yorsipp.com/literature/>

(Yorsass may not be able to accept all investments and reserve the right to refuse any investments.)

Have you taken any benefits from the Transferring Scheme?

☐ Yes

☐ No

If Yes, does the transfer include any Drawdown funds?

☐ Yes

☐ No

If yes, and you want to commence or continue to receive an income from your Yorsass scheme, please also complete a SSAS Benefit Payment Form, which is available on request or from our website: <http://www.yorsipp.com/literature/>

If the transfer includes Drawdown funds, is this:

☐ Capped Drawdown

☐ Flexi-Access Drawdown

(If a Capped Drawdown fund is being transferred, this will continue as Capped Drawdown unless you ask us to convert this to Flexi-Access Drawdown.)

Have you accessed benefits from the Transferring Scheme or any other UK Registered Pension Scheme in a way which means your contributions are subject to the Money Purchase Annual Allowance (MPAA

☐ Yes

☐ No

If yes, please provide the date the MPAA first applied

Is the transfer subject to any existing or proposed trustee in bankruptcy order?

☐ Yes

☐ No

Is the transfer in respect of Pension Credit rights, as a result of a divorce?

☐ Yes

☐ No

Is the transfer in respect of benefits that are subject to an attachment or earmarking order, as a result of a divorce?

☐ Yes

☐ No

Is the transfer subject to a pension sharing arrangement which has not yet been implemented?

☐ Yes

☐ No

Are you entitled to scheme-specific lump sum protection under the Transferring Scheme?

☐ Yes

☐ No

Do you have a protected pension age (below age 55) in the transferring scheme?

☐ Yes

☐ No

Is this transfer part of a Block Transfer?

☐ Yes

☐ No

If Yes please provide the names of the other member(s)

Does the transfer include Safeguarded Benefits?

☐ Yes

☐ No

(Examples include certain transfers from a Defined Benefit occupational pension scheme or an individual contract containing a Guaranteed Annuity Rate. If in any doubt about whether a transfer includes Safeguarded Benefits please speak to a Financial Adviser.)

Has advice been given in relation to the transfer of benefits to which this application relates?

☐ Yes

☐ No

If Yes, please provide details in Financial Adviser Details section below.

Protection against the Lifetime Allowance Charge

Have you registered with HM Revenue & Customs for protection against the Lifetime Allowance Charge?

☐ Yes

☐ No

If yes, please tick all that apply and provide a copy of the certificate or enter the HMRC reference number, as appropriate.

Enhanced Protection	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Enhanced Protection with Lump Sum Protection	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Primary Protection	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Primary Protection with Lump Sum Protection	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Fixed Protection (2012)	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Fixed Protection 2014	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Individual Protection 2014	<input type="checkbox"/>	Certificate Enclosed	<input type="checkbox"/>
Fixed Protection 2016	<input type="checkbox"/>	HMRC Reference	<input type="text"/>
Individual Protection 2016	<input type="checkbox"/>	HMRC Reference	<input type="text"/>

Financial Adviser Details

Name	Title	Forename(s)	Surname
Company Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	Postcode		
Tel No	<input type="text"/>		Mobile No
Email Address	<input type="text"/>		FCA No

Do you wish your Financial Adviser to receive remuneration from this transfer?

☐ Yes

☐ No

Amount £ or Percentage %

Declaration

I authorise, instruct and apply to the current provider to transfer sums and assets from the plan(s) as listed in the Transferring Scheme Details section of this application directly to Yorssas (Trustees) Limited and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise Yorssas (Trustees) Limited, the current provider, any contributing Employer and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to Yorssas (Trustees) Limited.

I accept that in order to comply with regulatory obligations, Yorssas (Trustees) Limited and the current provider named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.

Until this application is accepted and complete, Yorssas (Trustees) Limited's responsibility is limited to the return of the total payment(s) to the current provider(s).

When payment is made to Yorssas (Trustees) Limited as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in the Transferring Scheme Details section of this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Yorssas (Trustees) Limited and the current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.

Member's Signature

Date



YORSSAS

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Yorssas is a trading style of Yorssas Limited (08487141) and its subsidiary Johnston Pension Trustees Limited (06023104) along with its associated company Yorssas (Trustees) Limited (06147546), all registered at c/o Calvert Dawson Limited, 288 Oxford Road, Gomersal, Cleckheaton BD19 4PY.

All calls are recorded for quality, monitoring, training, and fact verification purposes.