



PENSION FORM

We're here to help should you have any queries.
Call us on 0117 457 7784.

This form should be completed if you wish to start drawing pension from your SSAS with Morhart Pension Services Ltd ('Morhart').

Completed forms should be sent to:

Morhart Pension Services Ltd
Unit G8, Temple 1852
Lower Approach Road
Temple Meads
Bristol
BS1 6QS

If you have any queries regarding the completion of the form, please contact the Morhart team on 0117 457 7784.

Form Sections

- 1 Scheme details
- 2 Your details
- 3 Pension required
- 4 Your bank details
- 5 Disinvestment
- 6 Declaration

1 Scheme Details

Scheme name	
Scheme reference	

2 Your Details

Full name	
Date of birth	

3 Pension Required

Please provide details of the level of pension you would like to receive:

Please provide a pension of	£		p.a.
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Required frequency
(tick one)

- Monthly
- Quarterly
- Six-monthly
- Annually

Pension payment date
(tick one)

- | | | |
|------------------|------------------|------------------|
| 12 th | 19 th | 26 th |
|------------------|------------------|------------------|

4 Your Bank Details

Please provide details of the account you would like us to pay your benefits in to:

Bank/Building Society name	
Account name	
Account number <i>(the account must be in your name)</i>	
Sort Code	
Roll number <i>(if applicable)</i>	
Payment reference <i>(if applicable)</i>	

5 Disinvestment

Please provide details of the relevant investments you would like to surrender to make the pension payments:

Name of investment	Policy number	Amount £	Any other instructions

Please bear in mind that any disinvestment will need the authority of all member trustees of the SSAS.

Important notes:

All regular payments will be received on fixed dates of the 12th, 19th or 26th of the month. In months where these dates fall on the weekend the payment will be received on the last working day before the weekend.

To make the payments on time, sufficient funds will need to be available in the SSAS's Cater Allen account two working days before the payment date e.g. for the 12th payroll the money needs to be in the account by the close of business on the 8th.

If you have a P45 from your previous employment, please forward it to us together with the completed pension form. Where permitted we will use it to apply the correct tax code for your pension. Otherwise, we will use the emergency tax code on Month 1 basis as we are obliged to do so by HMRC legislation which could result in your net pension being lower than expected. In this scenario you may wish to contact HMRC regarding your personal taxation.

6 Declarations

Please read and sign the declaration below:

- I declare that the information provided in this form, is accurate and complete.
- I understand that my pension payable from the SSAS will be subject to sufficient funds being available in the Cater Allen account.
- I understand that my pension payable from the SSAS will be subject to the payment of income tax.

Signature

Name

	Date	