



# 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 G6, 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

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- 1 Scheme details
- 2 Your details
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- 5 Disinvestment
- 6 Declaration

## 1 Scheme Details

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Scheme name

Scheme reference

## 2 Your Details

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Full name

Date of birth

## 3 Pension Required

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

Please provide a pension of

£	<input type="text"/>	p.a.
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Required frequency  
(tick one)

Monthly

Quarterly

Six-monthly

Annually

Pension payment date  
(tick one)

12<sup>th</sup>

19<sup>th</sup>

26<sup>th</sup>

## 4 Your Bank Details

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

Bank/Building Society name

Account name

Account number *(the account must be in your name)*

Sort Code

Roll number *(if applicable)*

Payment reference *(if applicable)*

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

## 5 Disinvestment

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**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 12<sup>th</sup>, 19<sup>th</sup> or 26<sup>th</sup> 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 12<sup>th</sup> payroll the money needs to be in the account by the close of business on the 8<sup>th</sup>.

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

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**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

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Name

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Date

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