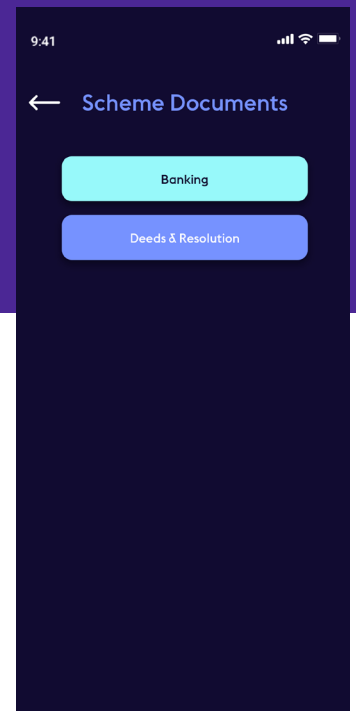


Transfer your SSAS to Retirement Capital

If you have a SSAS with another pension firm you may be able to transfer this to Retirement Capital

The process is straightforward:

- 1 Go online and visit <https://retirement.capital>
- 2 Speak to online support or book a call back
- 3 Let's talk and see if we can deliver what you need. If all good, move to step 4
- 4 You will be allocated a dedicated administrator to set up your move
- 5 We handle all the paperwork and issue you an activation code once completed.



Is it easy to move my SSAS to you?

In most circumstances yes. Any delays are usually because your current provider cannot work to our fast timescales, or because there are missing documents or failed investments.

We cannot takeover your SSAS administration where you have investments in overseas property, or exotic investments, such as car park investments or storage units.

How long it takes

We do everything online – we are the fastest in the business. It should take your old provider 2 weeks to complete the process.

What happens to my current banking and investments

We will open you a new bank account and remove your old provider from the documents and investments held, with your consent.

Rents and income we will move across to the new bank account. We will handle HMRC and any other reporting requirements.

Online Access

Once we have completed the transfer we will issue you (and anyone else in your SSAS) an account activation code. You will have secure online access and all your old documents and new will be available for you in your document centre.

Anyone else in your SSAS will also have secure online access to the same documents, statements and pension scheme information.

