



A Wholly Owned Subsidiary of Hargreaves Lansdown Plc. Authorised & Regulated by the Financial Conduct Authority.  
Company Registered in England and Wales No. 1896481. Registered Office at address shown.

**Asset Management Ltd**  
One College Square South,  
Anchor Road,  
Bristol,  
BS1 5HL

Tel: 0117 980 9926  
[www.hl.co.uk](http://www.hl.co.uk)

Pension Practitioner.com  
Daws House  
33-35 Daws Lane  
London  
NW7 4SD

03 July 2017

Our Ref: 1006820

**URGENT**

**Pension Transfer: Request for Discharge Forms**

Dear Sir/Madam

**Existing Policy: Pension Practioner.com WE170851B HELEN ADAMS**  
**Member: Mrs H J Adams , 32 Moss Mead Chippenham Wiltshire SN14 0TN**  
**Transferring into: HL Vantage SIPP (PSTR – 00616238RC)**

Please find attached a letter of authority to enable our client to transfer the above policy to the HL Vantage SIPP. I would be grateful if you could send the necessary transfer out details to enable this to proceed.

**What we require from you (please email where possible):**

✓	Discharge Forms
✓	Details of current scheme, including values
✓	Details of any safeguarded benefits <b>including the below*</b>

**\*Please note the Vantage SIPP cannot automatically accept transfers from the following schemes:**

- AVCs linked to a Defined Benefit scheme, where the AVC can provide some or all of the main scheme Tax Free Cash entitlement
- Money Purchase schemes or Section 32 plans with an underpin or containing GMP or 9(2B) rights
- Cash Balance schemes

**If you do not provide this information we will have to contact you again to confirm it.**

Additionally, please advise us if either the pension has been crystallised in full or part or if there is a court order attached to the plan.

If you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 980 9891 or at [sipptransfers@hl.co.uk](mailto:sipptransfers@hl.co.uk)

Yours faithfully,

Natasha Henderson

**Hargreaves Lansdown Asset Management Ltd**

# Two-minute transfer form

## Transfer other pensions to your SIPP



To transfer other pensions to your Vantage SIPP read the Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration) then complete the form below. Return to our simple freepost address: **Freepost HARGREAVES LANSDOWN**. We will do the rest of the transfer work for you.

Your pension will be transferred as cash unless otherwise arranged. We will write to you when the transfer completes so you can choose your investments. Remember the value of investments can fall as well as rise so you may get back less than you invest. Before transferring, ensure you will not incur excessive exit fees or lose valuable benefits or guarantees.

Returning this form allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible. Complete a separate form for each policy you wish to transfer. If you need additional forms, please print more copies.

**WHY NOT TRANSFER ONLINE?** Did you know you can apply to transfer online? Log in to your account at [www.hl.co.uk](http://www.hl.co.uk) and select 'Transfer to HL'

Policy one - Transfer to the Vantage SIPP	
Title (Mr/Mrs /Miss/etc)	MRS
Surname	ADAMS
Full forename(s)	HELEN JACQUELINE
Address	32 MOSS MEAD, CHIPPENHAM
Postcode	SN14 0TN
Date of birth	30 10 1959
National Insurance no.	WE 17 0851 B
Pension details	Scheme Name HYDON & GRIM
Policy number	HELEN ADAMS
Tick if this scheme is in Drawdown	<input type="checkbox"/>
Scheme type e.g. Stakeholder	SASS
Approx. transfer value (exact amount if partial transfer) £	168,000
Tick if partial transfer	<input type="checkbox"/>
Name and address of administrator	BRAD DAVIS
PENSIONPRACTITIONER.COM	
DAWS HOUSE	
Postcode	NW7 4SD
I confirm: LONDON	
<ul style="list-style-type: none"> <li>I have read the Transfer Checklist, checked if I will lose benefits or incur penalties and wish to transfer the policy listed above.</li> <li>I have read, understood and agree to the Common Transfer Declaration.</li> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to transfer and I will seek personal financial advice if I am unsure transferring is right for me.</li> <li>Where I am investing in a fund or an ETF, I am doing so on the basis of the information contained in the Key Features, Simplified Prospectus or Key Investor Information Document provided to me on paper, CD rom or via <a href="http://www.hl.co.uk">www.hl.co.uk</a>.</li> <li>I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.</li> </ul>	
X	Date 31 15 17

Policy two - Transfer to the Vantage SIPP	
Title (Mr/Mrs /Miss/etc)	
Surname	
Full forename(s)	Vantage
Address	08 JUN 2017
Postcode	
Date of birth	/ /
National Insurance no.	
Pension details	Scheme Name
Policy number	
Tick if this scheme is in Drawdown	<input type="checkbox"/>
Scheme type e.g. Stakeholder	
Approx. transfer value (exact amount if partial transfer) £	
Tick if partial transfer	<input type="checkbox"/>
Name and address of administrator	
Postcode	
I confirm:	
<ul style="list-style-type: none"> <li>I have read the Transfer Checklist, checked if I will lose benefits or incur penalties and wish to transfer the policy listed above.</li> <li>I have read, understood and agree to the Common Transfer Declaration.</li> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to transfer and I will seek personal financial advice if I am unsure transferring is right for me.</li> <li>Where I am investing in a fund or an ETF, I am doing so on the basis of the information contained in the Key Features, Simplified Prospectus or Key Investor Information Document provided to me on paper, CD rom or via <a href="http://www.hl.co.uk">www.hl.co.uk</a>.</li> <li>I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.</li> </ul>	
X	Date / /

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