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Company Registered in England and Wales No. 1896481. Registered Office at address shown.

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23 June 2017

Our Ref: 1006820

### **URGENT**

#### **Pension Transfer: Request for Discharge Forms**

Dear Sir/Madam

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

We have recently contacted your company and requested the necessary discharge forms in order to transfer the above policy. A transfer authority signed by the client was also attached to the request enabling you to proceed. **If you do not require discharge forms, please provide us with details of the above policy and what you require to proceed with the transfer.**

Our records show that as yet we have not received the required forms from you. I would therefore be grateful if you could send the discharge forms to us as soon as possible. If you have previously sent us the forms, unfortunately these have not been received.

If there will be a delay in providing the discharge forms, please contact us so that we can update our records accordingly.

Thank you for your assistance in this matter. If you have any further queries on this, please do not hesitate to contact me on 0117 980 9891 or by email at [sipstransfers@hl.co.uk](mailto:sipstransfers@hl.co.uk).

Yours sincerely

Sally Davies  
**Hargreaves Lansdown Asset Management Ltd**

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**HL Ref: 1006820 transfer from WE170851B HELEN ADAMS**

- ☐ The transfer instruction has been received and we enclose a copy of the discharge forms
- ☐ We cannot locate the client using the details provided above
- ☐ We have been unable to proceed with the transfer for the following reason(s):
  - ☐ DOB differs    ☐ NINO differs    ☐ Address differs    ☐ Incorrect Ref No    ☐ Name differs
  - ☐ Identity documentation required (*please provide details below*)
  - ☐ Client no longer holds any assets in this account.
  - ☐ We have not received your initial transfer request. Please resend a copy.
  - ☐ Other: