



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

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

08 June 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
Pension Scheme Tax Reference – 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.

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. If the transfer details can be provided in an electronic format please send this to the email address below.

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

Please provide further details, including values, if the pension in question is one of those listed.

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

Yours faithfully,


Sailesh Gurung

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 and select 'Transfer to HL'

Policy one - Transfer to the Vantage SIPP	
Title (Mr/Mrs /Miss/etc)	Surname
MRS	ADAMS
Full forename(s)	
HELEN JACQUELINE	
Address	
32 MOSS MEAD. CHIPPENHAM	
Postcode	Date of birth
SN14 0TN	30 10 1959
National Insurance no.	
WE170851B	
Pension details	Scheme Name
	HYDON & GRIM
Policy number	Tick if this scheme is in Drawdown
HELEN ADAMS	
Scheme type e.g. Stakeholder	
SASS	
Approx. transfer value (exact amount if partial transfer) £	Tick if partial transfer
168,000	
Name and address of administrator	
BRAD DAVIS	
PENSIONPRACTITIONER.COM	
DAWS HOUSE	
33-35 DAWS LANE	Postcode
	NW7 4SD
I confirm:	
<ul style="list-style-type: none"> I have read the Transfer Checklist, checked if I will lose benefits or incur penalties and wish to transfer the policy listed above. I have read, understood and agree to the Common Transfer Declaration. 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. 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 www.hl.co.uk. I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme. 	
<div> <div>X</div> <div>Heidi Adams</div> <div>Date</div> <div>X</div> <div>31 15 17</div> </div>	

Policy two - Transfer to the Vantage SIPP	
Title (Mr/Mrs /Miss/etc)	Surname
Full forename(s)	
Address	
Postcode	Date of birth
National Insurance no.	
Pension details	Scheme Name
Policy number	Tick if this scheme is in Drawdown
Scheme type e.g. Stakeholder	
Approx. transfer value (exact amount if partial transfer) £	Tick if partial transfer
Name and address of administrator	
Postcode	
I confirm:	
<ul style="list-style-type: none"> I have read the Transfer Checklist, checked if I will lose benefits or incur penalties and wish to transfer the policy listed above. I have read, understood and agree to the Common Transfer Declaration. 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. 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 www.hl.co.uk. I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme. 	
<div> <div>X</div> <div></div> <div>Date</div> <div>X</div> <div>1 1</div> </div>	

AMSDB