

Hargreaves Lansdown is a trading name of Hargreaves Lansdown Asset Management Ltd. 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.

**HARGREAVES
LANDSOWN**

One College Square South
Anchor Road
Bristol
BS1 5HL

Telephone: 0117 980 9926
www.hl.co.uk

Pension Practitioner.com
Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

06 August 2019

Our Ref: 1997649

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Pension Practitioner.com NB869307C [Partial Transfer]
Member: Mrs M Baker, 4 Steadings Rise Knutsford Cheshire WA16 0WB
Transferring into: HL SIPP (PSTR – 00616238RC)

Please find attached a letter of authority to enable our client to transfer the above policy to the HL 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 including the below*

*Please note the HL 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

Yours faithfully,



David Elliott
Hargreaves Lansdown Asset Management Ltd

Two-minute transfer form

Transfer other pensions to your SIPP

To transfer other pensions to your HL 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 LANDSDOWN**. 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. If you need additional forms, please photocopy more copies or call us.

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 HL SIPP

Title (Mr/Mrs/Miss/etc) **MRS** Full name **MARCIA CAROLINE BAKER**
Nationality **BRITISH**
Address **4 STEADINGS RISE, MERE**
CHESHIRE
Postcode **WA16 0WB** Date of birth **18 11/1963**
National Insurance no. **NB 8 6 9 3 0 7 C**
Pension details Name **PGB PENSION SCHEME**
Policy number
Pension type e.g. Stakeholder **SSAS**
Approx. transfer value (exact amount if partial transfer) £ **50,000**
Name and address of administrator **PENSION PRACTITIONER**
OFFICE 12, VENTUREWALKS
BUILDINGS, PENTREBACH
MERTHYR Postcode **CF48 4DR**

I confirm:

- I have read the Transfer Checklist and 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.
- I have read, agreed to and retained the Key (Investor) Information Document of my chosen investments (where available), including all costs and charges, provided to me at www.hl.co.uk or on paper.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

☒ **Baker** Date ☒ **31 17/19**

Policy two - Transfer to the HL SIPP

Title (Mr/Mrs/Miss/etc) Full name
Nationality
Address
Postcode Date of birth **1 1**
National Insurance no.
Pension details Name
Policy number
Pension type e.g. Stakeholder
Approx. transfer value (exact amount if partial transfer) £
Name and address of administrator



Tick if this is a drawdown policy

Tick if partial transfer

Postcode

I confirm:

- I have read the Transfer Checklist and 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.
- I have read, agreed to and retained the Key (Investor) Information Document of my chosen investments (where available), including all costs and charges, provided to me at www.hl.co.uk or on paper.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

☒ Date ☒ **1 1**

MAIN CONTACT AT PENSIONER PRACTITIONER;
GEORGINA STULIGHOWA TEL: 0800 634 4862
EMAIL: georginas@pensionpractioner.com