

COMPLETE THIS FOR OR TRANSFER TO AN

Please can you message me
the LOA form for me to complete
as per last transfer.

Many thanks
Marcia Baker

1. How to apply

For clients requesting a transfer: By 0
you do not plan to access your pension
If you're over 55 and would like to acce
transfer contact us on 0117 980 9926.

How to apply

- Read the Terms and Conditions and K
Investment Notes, Transfer and Coni
Transfer Declaration) on our website
- If setting up a Direct Debit: remem
the bottom of the page.
- If investing a lump sum: remember to include your cheque payable to
HL SIPP/your initials and surname for the net amount. e.g. to invest
£10,000, write your cheque for £8,000.

or email us at sipp@hl.co.uk

Return to our simple freepost address (no stamp needed):
Freepost HARGREAVES LANSDOWN

2. Your details

Title (Mr, Mrs, etc.):	Mrs	First name(s):	Marcia Caroline	Surname:	Baker
Address: 4 Steadings Rise Mere Cheshire					
Postcode:	WA16 0WB	Date of birth:	1 8 1 0 6 3	Nationality:	British
National Insurance No.	N B 8 6 9 3 0 7 C	Tick here if you have no NI No.		<input checked="" type="checkbox"/> Female	<input type="checkbox"/> Male
Marital status:	Married	Expected retirement age (optional):	Main tel. no: 07918 076275		
Email address:	marcia.berkin@btinternet.com				

Your employment status – please tick one box only

- | | | |
|---|---|--|
| <input type="checkbox"/> Employed | <input type="checkbox"/> Self employed | <input checked="" type="checkbox"/> Pensioner |
| <input type="checkbox"/> Unemployed | <input type="checkbox"/> Caring for one or more children under 16 | <input type="checkbox"/> Caring for a person aged 16 or over |
| <input type="checkbox"/> In full time education | <input type="checkbox"/> Child under 16 | <input type="checkbox"/> Other |

Pension protection – tick if you have registered or intend to register with HMRC for lifetime allowance protection which protects your tax free cash entitlement. Leave blank if not.

- | | | | |
|--|---|--|---|
| <input type="checkbox"/> Enhanced Protection (on funds built up before 6 April 2006) | <input type="checkbox"/> Primary Protection (on funds built up before 6 April 2006) | <input checked="" type="checkbox"/> Fixed Protection (on funds built up before 6 April 2012/2014/2016) | <input type="checkbox"/> Individual Protection (on funds built up before 6 April 2014/2016) |
|--|---|--|---|

3. Declaration and signature – please remember to include your cheque, where applicable

I confirm I have read and agree to the Declaration on page 2.

Please sign here		Date: 26 OCT 2023	Date: <input type="text"/>
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4. How much would you like to pay into your SIPP?

Personal contribution by cheque

Personal contributions should be paid net. E.g. to contribute £10,000 gross, tick the 2nd box below and complete your cheque for the net amount of £8,000 (multiply gross amount by 0.8). Cheques should be made payable to HL SIPP/Your initials and surname.

- | | | | |
|---|----------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> £3,600 (non earners) | <input type="checkbox"/> £10,000 | <input type="checkbox"/> £20,000 | <input type="checkbox"/> £60,000 |
|---|----------------------------------|----------------------------------|----------------------------------|

Other: £ gross (min £100, max £180,000)

Monthly contribution by Direct Debit

Please make sure you complete the Direct Debit mandate below.

AND/OR gross (min £25) multiply by 0.8 for the amount to be taken from your bank

5. Instruction to your bank or building society to pay by Direct Debit – only complete if you're investing by Direct Debit

HARGREAVES
LANSDOWN

Please keep a copy of the Direct Debit guarantee which is in the Terms and Conditions.
Please complete using dark ink.

Service User Number
837004



Name(s) of account holder(s):	
Branch Sort Code	Bank/Building Society Account Number
Name and full postal address of your Bank/Building Society	To the Manager:
Address:	Postcode:

Instruction to your Bank or Building Society – Please pay Hargreaves Lansdown Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Hargreaves Lansdown and, if so, details will be passed electronically to my Bank/ Building Society.
Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

Please sign here		Date: <input type="text"/>
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Turn over to transfer your pensions, choose your investments and read the declaration

- **Transfer your pension investments** - all your investments and cash will be transferred. You will be invested during the transfer, so you could make gains or losses. Usually you cannot trade until your transfer is complete.

We'll contact you to cover your options if your provider cannot transfer your pension investments or you hold an investment we do not offer.

Title (Mr, Mrs, etc):		Mrs		First name(s):										Marcia Caroline										Surname:										Baker																											
Address:		4 Steadings Rise Mere Cheshire																																								Postcode:										WA16 0WB									
Date of birth:		1	8	1	0	6	3	National Insurance No.										N	B	8	6	9	3	0	7	C	Tick here if you have no NI No.																																		

☒ Transfer your pension as cash ☐ Transfer your pension investments

Pension name: PGB Pension Scheme	Policy number:
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Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £	£36,000	<input checked="" type="checkbox"/> Tick if partial transfer
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Pension type: e.g. Stakeholder	SASS	<input type="checkbox"/> Tick if this is a drawdown policy
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Name and address of administrator:	Retirement Capital	Office 12 Ventre Wales Building, Pentrebach, Merthyr, Tydfil,	Postcode: CF48 4DR
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- ☒ I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.
- ☒ 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.

- 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.

Please
sign here

X M Baker

information they require

Vantage SM

~~26 OCT 2023~~

Date: 2 3 1 0 6 3

Investment choice		Transfer	Lump sum	Monthly saving
Full fund/share name		(min. €100 per fund)	(min. €100 per fund)	(min. €25 per investment)
		%	€	€
		%	€	€
		%	€	€
If you'd like to choose more investments please let us know on a separate sheet.				
<input type="checkbox"/>	Reinvest income automatically	Cash %	€	€
<input checked="" type="checkbox"/>	Hold income as cash in your SIPP	Total 100%	€	€

For your own benefit and protection you should read our Terms and Conditions carefully before committing to an investment. If you do not understand any point please ask us for further information. When you use our services we will take this as acceptance and agreement of our terms, and you will be bound by them.

I confirm I am applying to join the HL SIPP. I have read in full, agreed to and retained:

- The Terms and Conditions of the HL SIPP.
- The Key Features of the HL SIPP, Important Investment Notes and Contribution and Transfer Checklists.
- Key (Investor) Information Document of my chosen investments (where available), and all costs and charges, provided to me at www.hl.co.uk or on paper.

I agree to be bound by the Scheme Rules, and acknowledge that these have been made available to me by HL.

I confirm that I will be a relevant UK individual in any tax year in which personal contributions are paid. I declare

that the total contributions that I will make to the HL SIPP and any other Registered Pension Scheme where I am entitled to relief under Section 188 of the Finance Act 2004 will not exceed the higher of:

- The basic amount (currently £3,600) or
- 100% of my Relevant UK Earnings (within the meaning of section 189 of the Finance Act 2004) for that tax year.

This declaration and the particulars given in this application are, to the best of my knowledge and belief, correct and complete.

If an event occurs which means that I will no longer be entitled to tax relief under Section 188 of the Finance Act 2004, I will inform Hargreaves Lansdown Asset Management by 5th April of the tax year in which the event occurs or 30 days after the event if later.

If I make a contribution, of which part or all is not eligible for tax relief, I will notify you separately on or before the date of the contribution.

I will advise Hargreaves Lansdown Asset Management Ltd, in writing, within 30 days if I cease to be a UK resident

I confirm that I have not received advice from HL regarding the merits of entering into, or the suitability of any aspect of, the HL SIPP unless that aspect has been covered under a separate agreement for individual advice from a Hargreaves Lansdown Financial Adviser. If I have any doubts I will seek personal advice, in particular regarding the merits of the various pension options I may have available to me now and in the future.

By signing this declaration I am allowing HL to process my application using the information that I have provided.

This declaration and any other declaration made by me in connection with this application shall be the basis of the contract between me and Hargreaves Lansdown Asset Management Ltd.

False Statements – It is a serious offence to make false statements; the penalties are severe and could lead to prosecution.