



BEST ONLINE SIPP PROVIDER
HARGREAVES
LANSDOWN



HARGREAVES LANSDOWN

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
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Bristol
BS1 5HL

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

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

21 August 2018

Our Ref: 1997649

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Pension Practioner.com NB869307C [Partial Transfer]
Member: Mrs M Baker , 4 Steadings Rise Knutsford Cheshire WA16 0WB
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. **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.

We understand the above policy is part of a Small Self Administered Scheme. If the above client is the sole member of the SSAS and it is being wound up, we understand that the ceding scheme trustees and/or administrators will handle all aspects of the wind up.

If the SSAS contains any property or there is a court order, loan or deficit attached to the plan, please contact us before proceeding.

If benefits have been crystallised or any tax free cash paid please also do not proceed with the transfer and contact us immediately.

In the event the above policy is not a SSAS scheme I would be grateful if you could contact us as soon as possible, as the details we require differ with the type of scheme being transferred.

Please **DO NOT ISSUE A CHEQUE** at this point; we are unable to accept the transfer without this information.

If you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 9809926 or at sipptransfers@hl.co.uk

Yours faithfully,

Kate Bassett

Hargreaves Lansdown Asset Management Ltd

SECTION 4**TRANSFER YOUR EXISTING PENSIONS**

Read the Transfer Checklist and Common Transfer Declaration first. Leave blank if not transferring pensions.

Returning these forms allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible. Complete a separate form for each policy you transfer.

POLICY 1 - TRANSFER TO THE HL SIPP

AWSNA

Title (Mr, Mrs etc) MRS	Full Name MARCIA CAROLINE BAKER	Address 4 STADINUS RISE, MERE, CHESHIRE	
Postcode WA14 0WB		National Insurance No. NB869307C	Date of Birth 181063
Pension details	Pension Name PCB PENSION SCHEME	Policy number HMAC REG 00787896RQ	Tick if this is a drawdown policy <input type="checkbox"/>
Approx. transfer value (exact amount if partial transfer) £40,000		Tick if partial transfer <input checked="" type="checkbox"/>	Pension type e.g. Stakeholder SSAS
Name and address of Scheme Administrator PENSION PRACTITIONER, UK ADMINISTRATION, 48 CHORLEY NEW ROAD, BOLTON			

I confirm:**BLI 4AP**

- 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 Features, Key Investor Information Document or

Key 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.

X <i>St Baker</i>	Date X 14/8/18
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POLICY 2 - TRANSFER TO THE HL SIPP

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