



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](http://www.hl.co.uk)

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

RECEIVED  
05 FEB 2018

26 January 2018

Our Ref: 1997649

**URGENT**

**Pension Transfer: Request for Discharge Forms**

Dear Sir/Madam

**Existing Policy: Pension Practitioner.com NB869307C**  
**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.

**What we require from you (please email where possible):**

✓	Discharge Forms
✓	Details of current scheme, including values
✓	Details of any safeguarded benefits <b>including the below*</b>

**\*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

**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](mailto:sipptransfers@hl.co.uk)

Yours faithfully,

David Elliott  
Hargreaves Lansdown Asset Management Ltd

# **SECTION 4 TRANSFER PENSIONS TO THE VANTAGE SIPP** – COMPLETE BELOW

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 transfer (for extras call 0117 980 9926 or make a photocopy). Read the enclosed Transfer Checklist and Common Transfer Declaration contained within the Important Investment Notes first. Your pension will be transferred as cash.

## **POLICY 1 TRANSFER TO THE VANTAGE SIPP**

IM117

Title (Mr, Mrs etc)	Full Name <b>MARCIA BAKER</b>		
Address <b>4 STEADINGS RISE, MERE, CHESHIRE</b>			
Postcode <b>WA16 0WB</b>	Nationality <b>BRITISH</b>		
National Insurance No. <b>NB8 69307C</b>	Date of Birth <b>1 8 1 0 6 3</b>		
Pension details Pension name <b>PCB PENSION SCHEME</b>			
Policy number <b>N/A</b>			
Pension type e.g. Stakeholder <b>SSAS</b>	<input type="checkbox"/> Tick if this is a drawdown policy <input checked="" type="checkbox"/> Tick if partial transfer		
Approx transfer value (exact amount if partial transfer) <b>£40,000</b>			
Scheme Administrator name and address <b>PENSION PRACTITIONER . COM 48 CHORLEY NEW ROAD, BOLTON, BL1 4AP</b>			

### **I confirm:**

- 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 authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.
- I have read the Key Features, Simplified Prospectus, 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](http://www.hl.co.uk) or on paper.

**X** *M. Baker* SIGN HERE

**X** **24.1.18** DATE

## **POLICY 2 TRANSFER TO THE VANTAGE SIPP**

IM117

Title (Mr, Mrs etc)	Full Name		
Address			
Postcode	Nationality		
National Insurance No.	Date of Birth		
Pension details Pension name			
Policy number			
Pension type e.g. Stakeholder	<input type="checkbox"/> Tick if this is a drawdown policy <input type="checkbox"/> Tick if partial transfer		
Approx transfer value (exact amount if partial transfer) £			
Scheme Administrator name and address			

Vantage SIPP  
25 JAN 2018

### **I confirm:**

- 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 authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.
- I have read the Key Features, Simplified Prospectus, 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](http://www.hl.co.uk) or on paper.

**X** SIGN HERE

**X** DATE