

SIPP Transfers

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

Ms G Stuliglowa  
Pension Practitioner  
Pension Practitioner Venture Wales  
Merthyr Tydfil Industrial Park  
Pentrebach  
Merthyr Tydfil  
Mid Glamorgan  
CF48 4DR

01 April 2021  
Our Ref: 2389344

**URGENT**

**Pension Transfer: Request for Discharge Forms**

Dear Sir/Madam

Existing Policy: Pension Practitioner YM969697A [Partial Transfer]  
Member: Mr P G Baker, 4 Steadings Rise Mere 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. **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](mailto:sipptransfers@hl.co.uk)

Yours faithfully,



Eleanor Watson  
Hargreaves Lansdown Asset Management Ltd



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Before transferring please read the enclosed SIPP Key Features, including:

- ✓ Important Investment Notes
- ✓ Transfer Checklist
- ✓ Common Transfer Declaration

It's also really important to make sure you won't lose any valuable guarantees or benefits from your current pension provider or have to pay excessive exit fees. We wouldn't want you to lose money.

We'll transfer your pension as cash (unless you request otherwise), which means it won't be affected by any stock market rises or falls for a period. Once your transfer is complete, you can choose your investments.

If you're transferring a pension that's already in drawdown you'll need to complete a set of risk questions before we send you a drawdown application. You can do this by calling us on 0117 980 9926.

We'll write to you to let you know when your transfer completes.

## CASHBACK AVAILABLE

Transfer pensions worth £5,000+ to the HL SIPP and we'll pay you between £50 and £500 as a thank you. The money doesn't come from your account.

To qualify automatically, apply by 3 September 2019. However, if you need more time to decide, let us know and we will extend the deadline by up to six months - call 0117 980 9926 or email [transferoffer@hl.co.uk](mailto:transferoffer@hl.co.uk)

Your cashback will be paid after the offer closes and your transfer the completes. If you close your account within a year, we may ask you to repay the cashback. For offer terms, see page 15 of the enclosed Terms and Conditions.

The more you transfer, the more you receive.

YOU TRANSFER	WE PAY YOU
£5,000 - £24,999	£50
£25,000 - £49,999	£75
£50,000 - £99,999	£100
£100,000 - £149,999	£250
£150,000 +	£500

Policy 1 - transfer to the HL SIPP

SCCB3

Title (Mr, Mrs, etc.): Mr	First name(s): PG) PETER GEOFFREY	Surname: Baker
Address: 4 Steadings Rise, Mere, Knutsford, Cheshire		Postcode: WA16 0WB
Date of birth: 08/11/49	National Insurance No. YM969697A	Nationality: BRITISH

Pension details	Pension name: PG PENSION SCHEME	Policy number:
Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £ 41,000	<input checked="" type="checkbox"/> Tick if partial transfer <input type="checkbox"/> Tick if this is a drawdown policy
Pension type: SSAS	Name and address of administrator: PENSION PRACTITIONER, OFFICE 12, VENTURE WALES BUILDING, PENTREBACH, MERLHYR Postcode: CF48 4DR	

- I confirm
- I have read the cashback terms, 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](http://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	Date: 23/03/21
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Policy 2 - complete if you want to transfer another pension

SCCB3

Title (Mr, Mrs, etc.):	First name(s):	Surname:
Address:		Postcode:
Date of birth:	National Insurance No.	Nationality:

Pension details	Pension name:	Policy number:
Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £	<input type="checkbox"/> Tick if partial transfer <input type="checkbox"/> Tick if this is a drawdown policy
Pension type: e.g. Stakeholder	Name and address of administrator:	Postcode:

- I confirm
- I have read the cashback terms, 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](http://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	Date:
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If you have any questions call us on 0117 980 9926, visit [www.hl.co.uk](http://www.hl.co.uk) or email us at [sipp@hl.co.uk](mailto:sipp@hl.co.uk)  
 Return to our simple freepost address (no stamp needed): Freepost HARGREAVES LANSDOWN