

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  
LANDSDOWN**

SIPP Transfers

One College Square South  
Anchor Road  
Bristol  
BS1 5HL

Telephone: 0117 980 9926  
[www.hl.co.uk](http://www.hl.co.uk)

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

02 October 2020

Our Ref: 1018697

Dear Sir/Madam

Existing Policy: Pension Practitioner 00723510RS  
Member: Mr P J Goldfinch , 6 La Sagesse Newcastle Upon Tyne NE2 3AF  
Transferring into: HL SIPP  
Pension Scheme Tax Reference – 00616238RC

Please find a letter of authority attached in relation to the policy stated above. We will contact you in due course should any additional details or paperwork be required.

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

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,



Megan Williams  
Hargreaves Lansdown Asset Management Ltd

# SIPP TWO-MINUTE TRANSFER FORM

1018697

HARGREAVES  
LANSDOWN

Before transferring please read the 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.

## GOT ONLINE ACCESS?

If you're a client, the fastest way to transfer a pension is online. All you need to do is:

1. Visit [www.hl.co.uk/sipp-transfer](http://www.hl.co.uk/sipp-transfer)
2. Select 'transfer your pension now'

### Policy 1 – transfer to the HL SIPP

AWST1

|                       |          |                        |                        |
|-----------------------|----------|------------------------|------------------------|
| Title (Mr, Mrs, etc): | MR       | First name(s):         | PAUL                   |
| Surname:              |          |                        | GOLOFINCH              |
| Address:              |          |                        | 6 LA SAGESSE NEWCASTLE |
| Postcode:             |          |                        | NE13AF                 |
| Date of birth:        | 27/07/73 | National Insurance No. | NZ625628A              |
| Nationality:          |          |                        | BRITISH                |

### Pension details

|  |   |
|--|---|
| Pension name:  | GOLDFINCH FAMILY TRUST  |
| Approx. value of funds in drawdown £                       | /   |
| Approx. value of funds not in drawdown £                   | 275,000   |
| Pension type: e.g. Stakeholder                             | SASS  |
| Name and address of administrator:                         | PENSION PRACTITIONER OFFICE 12, Venture wales, Merthyr tydfil |
| Policy number:   | 00723510RS  |
| <input type="checkbox"/> Tick if partial transfer          |   |
| <input type="checkbox"/> Tick if this is a drawdown policy |   |
| Postcode:  | CF48 4DR  |

### 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 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 | X P. Goldfinch | Date: | 22 SEP 2020 |
|------------------|----------------|-------|-------------|

### Policy 2 – complete if you want to transfer another pension

AWST1

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

### 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 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 | X | Date: |  |
|------------------|---|-------|--|

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**