

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  
LANDSOWN**

SIPP Transfers

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Bristol  
BS1 5HL

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

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

Our Ref: TO/2807745  
Your Ref: Ian Pask  
20 December 2020

Dear Sir or Madam

**HL SIPP transfer Mr I M Pask 28 Drayton Grove London W13 0LA**

I am writing with regards to the instruction we have received regarding the transfer of the above client's pension from our management to you.

In order for us to be able to proceed with the transfer, please provide us with the below documents:

- Completed HL Transfer out form
- A copy of the scheme rules;
- A copy of the scheme's trust deed;

We thank you in advance for your assistance and look forward to hearing from you. Should you have any queries please do not hesitate to contact us by post or email  
[TransferOutSSASApplications@hl.co.uk](mailto:TransferOutSSASApplications@hl.co.uk).

Yours faithfully



Kate Bassett  
HL Transfer Out Team

# HL SIPP Transfer Out Form (new provider)

HARGREAVES  
LANSDOWN

05.18

## New Pension Provider's Details

Scheme name

Company name

Name and address  
of Scheme Administrator

Phone number

Contact name

Client name

DOB

/ /

Client number

### Scheme type (please tick as appropriate)

- ☐ **SIPP/SSAS** – Nature of transfer: 100% cash/wholly or partly in specie (please provide stockbroker details separately for in specie)
- ☐ **100% insured** – Transfer cheque may only be payable to the scheme administrator or the insurance company involved
- ☐ **Retirement Annuity** – It is not possible for a scheme formerly approved as a retirement annuity contract under Chapter 3 Part 14 Income and Corporation Taxes Act 1988 to accept a transfer from the HL SIPP.
- ☐ **Occupational Money Purchase (other than SSAS)** – Nature of transfer: 100% cash/wholly or partly in specie (please provide stockbroker details separately for in specie)
- ☐ **Deferred annuity/section 32 buy out** – For this option, by signing the declaration you are also confirming that you are an insurance company authorised to carry out long term business in the UK.
- ☐ **Other** – Please specify the nature of your scheme:

**Scheme Registration:** We confirm the above scheme is registered under Chapter 2 of Part 4 of Finance Act 2004 or deemed to be so registered by virtue of paragraph 1 (1) of Schedule 36 Finance Act 2004.

Pension scheme  
tax reference (PSTR)

### Please indicate your preferred payment type:

Electronic Transfer ☐

### Please provide bank details:

Account name

Account number

Sort code

Name and address  
of bank branch

Postcode

Payment reference

Cheque ☐

### Please provide payee details:

**Declaration:** We declare the above information is true and complete and we are willing and able to accept this transfer. We confirm the funds transferred will be applied to provide benefits consistent with the legislation covering Registered Pension Schemes. We give permission for HMRC to provide the scheme administrator of the HL SIPP with information relating to the status and registration of our scheme.

Signature

Name

Position

Date

/ /

### Ceding Scheme Details

**Full Name:** HL SIPP

**Scheme Type:** Self Invested Personal Pension Deemed as registered by virtue of paragraph 1(1) of Schedule 36 of the Finance Act 2004.

**Pension Scheme Tax Reference (PSTR):** 00616238RC