

SIPP Transfers

One College Square South
Anchor Road
Bristol
BS1 5HL

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

22 March 2021

Our Ref: 1997649

Dear Sir/Madam

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

Yours faithfully,

Megan Baldwin
Hargreaves Lansdown Asset Management Ltd

1997649

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DOWN
09 MAR 2021HARGREAVES
LANDS DOWN

Two-minute transfer form

Transfer other pensions to your SIPP

To transfer other pensions to your HL SIPP read the Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration) then complete the form below. Return to our simple freepost address: Freepost HARGREAVES LANDS DOWN. We will do the rest of the transfer work for you.

Your pension will be transferred as cash unless otherwise arranged. We will write to you when the transfer completes so you can choose your investments. Remember the value of investments can fall as well as rise so you may get back less than you invest. Before transferring, ensure you will not incur excessive exit fees or lose valuable benefits or guarantees.

Returning this form allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible. If you need additional forms, please photocopy more copies or call us.

WHY NOT TRANSFER ONLINE? Did you know you can apply to transfer online? Log in to your account at www.hl.co.uk and select 'Transfer to HL'.

Vantage

09 MAR 2021

Policy one - Transfer to the HL SIPP

Title (Mr/Mrs/Miss/etc) **MRS** Full name **MARCIA CAROLINE BAKER**

Nationality **BRITISH**

Address **4 STEADINGS RISE, MERE CHESHIRE**

Postcode **WA16 0WB** Date of birth **18/10/1963**

National Insurance no. **NB 8 6 9 3 0 7 C**

Pension details Name **PGB PENSION SCHEME**

Policy number **SSAS** Tick if this is a drawdown policy ☐

Approx. transfer value (exact amount if partial transfer) £ **60,000**

Tick if partial transfer ☒

Name and address of administrator **PENSION PRACTITIONER OFFICE 12, VENTURE WAKES BUILDINGS, PENTREBACH**

MERTHYR TYDFIL Postcode **CF48 4DR**

I confirm:

- 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 (Investor) 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.

☒ **Y Baker** Date **13/12/2021**

Policy two - Transfer to the HL SIPP

Title (Mr/Mrs/Miss/etc) Full name

Nationality

Address

Postcode

National Insurance no.

Pension details Name

Policy number

Pension type eg Stakeholder

Approx. transfer value (exact amount if partial transfer) £

Tick if this is a drawdown policy ☐

Name and address of administrator

Postcode

I confirm:

- 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 (Investor) 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.

☒ Date **1/1**

MAIN CONTACT AT PENSIONER PRACTITIONER;

GEORGINA STULIGHOWA

TEL: 0800 634 4862

EMAIL: georginas@pensionpractitioner.com