



Stockbrokers Limited

One College Square South
Anchor Road
Bristol
BS1 5HL

Telephone: 0117 980 9800
www.hl.co.uk

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

08 July 2016

Our ref: 973870

Dear Sir/Madam

Transferring from: HL Vantage SIPP – 973870
Transferring to: Pension Practioner.com – 1850 Pension Scheme
Member: Mr G Bell – 26/03/1966

I am writing in respect of the above transfer.

In order for us to be able to proceed with the transfer, please could you complete the enclosed transfer out form and return it to Hargreaves Lansdown along with a copy of your HMRC approval letter or a letter confirming your registration showing your Pension Scheme Tax Reference Number. Please note that cash transfers can also be requested through Origo Options.

I trust that you will find the above to be in order, however if you have any further queries on the above, please contact us on 0117 980 9985 or at sipp@hl.co.uk.

Yours/faithfully

A handwritten signature in black ink, appearing to read 'Hannah Collins', written over a horizontal line.

Hannah Collins
Hargreaves Lansdown Asset Management

Vantage SIPP

Transfer Out Form

Part A - You should complete this part first

Vantage SIPP
10 JUN 2016

HARGREAVES
LANSDOWN

02.13 (2)

1. Your Details

Title(Mr/Mrs/Miss/etc)	MR	Surname	BELL	Full forenames	GARY
National Insurance no.	N 4 6 4 6 7 0 6 A				
Postcode	M 3 3 A J	Date of birth	26 10 1966	HL Client No.	973 870

2. Details of your new pension scheme

Scheme name	ISSO PENSION SCHEME	Type of pension	SSAS	Policy number (if known)	
Name and address of scheme administrator	PENSION PRACTITIONER.COM DAWS HOUSE				
	33-35 DAWS LANE	LONDON		Postcode	NW7 4SD

3. Fund to be transferred

Would you like the full fund to be transferred? Yes ☐ No ☒

If no, please indicate the portion of the fund to be transferred: % OR £ 70,000 - ∞

How should your fund be transferred?

Cash ☒

In Specie (Stock Transfer) ☐ Please note that some pension schemes do not accept stock transfers, or may decline an 'in specie' transfer of certain assets. Any holdings which cannot be transferred in specie will be sold and transferred as cash. Any investment income received in your SIPP following our receipt of this application will be transferred as cash.

Important Note: It is your responsibility to ensure there is sufficient cash to pay any transfer-out fees. If you prefer to pay any transfer-out fees by cheque, please return your cheque with this form.

If you wish to transfer only part of your fund, you must specify the assets to be transferred (for an 'in specie' transfer) or ensure there is sufficient cash (if it is to be a cash transfer).

Income Drawdown Transfers - HMRC regulations permit the transfer of full income drawdown arrangements only. If you would like to transfer out part of your income drawdown plan please contact us before proceeding.

Declaration

- I confirm that I wish to transfer my HL Vantage SIPP to the Registered Pension Scheme shown above. I authorise Hargreaves Lansdown to provide the scheme administrator named above with any information that they require in respect of this transfer.
- For cash transfers, please accept this instruction to sell any assets currently held within my HL Vantage SIPP including, where applicable, those held within the HL Group SIPP and the HL Portfolio Management Service (PMS). The proceeds should be transferred to the scheme detailed above.
- If I have requested a full transfer I understand that all regular payments being made to my SIPP will be cancelled on receipt of this form unless I have given written instructions to the contrary. Please accept this as my authority to contact my employer to cancel these contributions where applicable.
- I understand a transfer fee of £75, or £250 for a transfer to an Overseas Pension Scheme, will be deducted from the fund value before it is transferred.
- If I have received a cash incentive from Hargreaves Lansdown in the past 12 months, I understand I must reimburse Hargreaves Lansdown for the full amount. This is in accordance with the original cash offer terms. I have enclosed a cheque for the amount due with this form.
- I understand I have not received and will not receive any advice from Hargreaves Lansdown regarding any aspect of this transfer, unless that aspect is covered under a separate agreement for individual advice from a Hargreaves Lansdown Financial Practitioner.
- I confirm that the information provided above is to the best of my knowledge true and complete.

I confirm that the payment made and/or assets transferred (as appropriate) shall constitute a full and final discharge in respect of this portion of my HL Vantage SIPP (as specified above), and that I shall have no further claim against Hargreaves Lansdown in respect of this portion.

Signature ☒

Gary Bell

Date ☒

09/06/2016

PART B - This section will be completed by your new pension provider

Your Details

Scheme name

Company name

Name and address
of Scheme Administrator

Phone number

Contact name

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 Vantage SIPP.
- ☐ **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.
- ☐ **QROPS** - As this transfer is a Benefit Crystallisation Event there will be further documents to be completed to ascertain whether or not there is a Lifetime Allowance Charge to be deducted prior to transfer
- ☐ **Other** - Please specify the nature of your scheme:

Scheme Registration: We confirm that 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, or is a Qualifying Recognised Overseas Pension Scheme (QROPS).

Pension scheme
tax reference (PSTR)

OR

QROPS reference
number

ASCN (if applicable)

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

Policy number
(if known)

Cheque ☐

Please provide payee details:

Declaration: We declare that the above information is true and complete and that we are willing and able to accept this transfer. We confirm that 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 Vantage SIPP with information relating to the status and registration of our scheme.

Signature

Name

Position

Date

Ceding Scheme Details

Full Name: HL Vantage 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