



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.



**Asset Management Ltd**  
One College Square South,  
Anchor Road,  
Bristol,  
BS1 5HL

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

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

16 December 2013

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.

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](mailto:sipp@hl.co.uk).

Yours faithfully

Marc Davis  
**Hargreaves Lansdown Asset Management**

# Vantage SIPP

## Transfer Out Form

Part A - You should complete this part first

Vantage SIPP  
18 DEC 2013

HARGREAVES  
LANSDOWN

02.13 (2)

### 1. Your Details

Title(Mr/Mrs/Miss/etc)	MR	Surname	BELL	Full forenames	GARY
National Insurance no.	NH 64 6 7 0 6 A				
Postcode	M3 3AJ		Date of birth	26 10/3 1966	
			HL Client No.	973 870	

### 2. Details of your new pension scheme

Scheme name	1850 Pension Scheme	Type of pension	SSAS	Policy number (if known)	
Name and address of scheme administrator	Pension Practitioner, GOM, Daws House, 33-35 Daws Lane				
				Postcode	NW7 4SD
				LONDON	

### 3. Fund to be transferred

Would you like to transfer your fund? Yes ☐ No ☒

If no, please indicate the portion of the fund to be transferred:  % OR £ 15,000 — 00

How would you like to transfer it?

Cash ☒ ☐ In Specie (Stock Transfer)

If you elect 'In Specie' transfer, 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).

Important Note: If you are unable to transfer the fund as cash to pay any transfer-out fees, all you prefer to pay any transfer-out fees by cheque, please inform your adviser of this.

If you wish to transfer 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: If you are transferring 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).

### Declaration

I confirm that I am the owner of the fund to be transferred and I have not received any advice from Hargreaves Lansdown in the past 12 months regarding the transfer of the fund. I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

I have read and understood the terms and conditions of the transfer and I agree to transfer the fund to the new pension scheme.

Signature X	Date X
	9 / 12 / 2013

## 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

#### Schema 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: \_\_\_\_\_

**Schema 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

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

Pension Scheme Tax Reference (PSTR): 00616238RC