



A Wholly Owned Subsidiary of Hargreaves Lansdown Plc. Authorised & Regulated by the Financial Services Authority.
Company Registered in England and Wales No. 1896481. Registered Office at address shown.

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

15 March 2012

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 9926 or at sipp@hl.co.uk.

Yours faithfully

Marc Davis
Hargreaves Lansdown Asset Management

Vantage SIPP
15 MAR 2012

Vantage SIPP

Transfer Out Form

Part A - You should complete this part first

03.11

1. Your Details	
Title (Mr/Mrs/Miss/etc)	MR
Surname	Beck
Full forenames	Gay
National Insurance no.	NH 646 706 A
Postcode	M3 3AT
Date of birth	26/03/1966
HL Client No.	973870

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, 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, would you like to transfer:	Non-Protected Rights only ☒ Protected Rights only ☐ A portion of the total fund ☒ If so, what portion is to be transferred?
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.
Important Note:	If you wish to transfer only part of your fund it is your responsibility to ensure that there is sufficient cash (if it is to be a cash transfer), or to specify the assets to be transferred (for an 'in specie' transfer).
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 Portfolio Management Service (PMS). The proceeds should be transferred to the scheme detailed above. I understand that a transfer fee of £75.00 + VAT will be deducted from the fund value before it is transferred. 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. I confirm that the information provided above is to the best of my knowledge true and complete. I understand that I will receive no advice from Hargreaves Lansdown relating to this transfer either now or in the future, unless I have received a written report from a Hargreaves Lansdown Financial Practitioner. 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	
Date	12/03/2012

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 A

SCN: 7001369K