Vantage SIPP Transfer Out Form



Part A - You should complete this part first

02.13 (2)

1. Your Details	
Title(Mr/Mrs MR Surname THOMAS	Full forenames TORDON WILLIAM
National Insurance no. W K 8 9 7 3 2 1 A	
Postcode ME14 ZAA Date of birth 22 14 11960	HL Client No. 2001157
2. Details of your new pension scheme	
Scheme name THE GOLDON THOMAS PENSION Type of pension	Policy number (if known)
Name and address of scheme administrator	
	Postcode
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 £67400
How should your fund be transferred?	
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.

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.

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

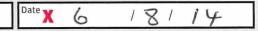
In Specie (Stock Transfer)

- 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 X	Thomas



PAR'T B - This section will be completed by your new pension provider

Your Details							
Scheme name		Company nam	e		11.174.1		
Name and address of Scheme Administrator							
Phone number	Conatact name						
Scheme type (please tick as appropriate)							
SHPP/SSAS - Nature of transfer: 100%	6 Cash/Wholly or Partly in spe	cie (Please p	rovide stock	broker details	separately	for in	specie)
100% insured - Transfer cheque may	only be payable to the schem	e administra	itor or the in	surance comp	any involve	ed	
Retirement Annuity - It is not possible Income and Corporation Taxes Act 19				uity contract u	nder Chapt	er 3 Po	art 14
Deferred annuity/section 32 buy out - company authorised to carry out lor		e declaration	you are also	o confirming t	hat you are	an in	surance
QROPS - As this transfer is a Benefit not there is a Lifetime Allowance Ch			documents to	o be complete	d to ascerto	ain wh	ether or
Other - Please specify the nature of y	your scheme:						
Scheme Registration: We confirm that the al registered by virtue of paragraph 1 (1) of Sche							
Pension scheme tax reference (PSTR)	C	OR QROPS	S reference er				
ASCN (if applicable)							
Please indicate your preferred payment ty	ре:						
Electronic Transfer							
Please provide bank details:							
Account name	Account number			Sort code			
Name and address of bank branch							
	Postcode	Postcode		Policy number (if known)			
Cheque Please	e provide payee details:						
Declaration: We declare that the above information transferred will be applied to provide benefits the scheme administrator of the HL Vantage S	consistent with the legislation co	overing Registe	ered Pension S	Schemes. We giv			
Signature		Name					
Position				Date	Ĭ		1
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