

# PENSION TRANSFER OUT FORM

**HARGREAVES  
LANSDOWN**

Use this form to transfer part, or all, of your HL pension to another registered pension scheme.

If you would like to transfer to a Qualifying Recognised Overseas Pension Scheme (QROPS), please contact us for a different form.

## What you need to know

- We'll transfer your pension as cash, unless you tell us otherwise in section 2 and 3. Not all pension providers will allow you to transfer your investments. If this is the case we'll sell all your investments and transfer as cash.
- You can transfer up to two pension accounts using this form.
- If you wish to transfer only a part of your pension, please make sure there is enough cash available. If you're transferring your pension as is, please let us know the investments to be transferred.
- If you want to transfer part of your drawdown account please contact our pensions experts before completing this form on **0117 980 9926**.

Return this form to: **Hargreaves Lansdown, 1 College Square South, Anchor Road, Bristol, BS1 5HL**

## What happens next?

- If you're transferring your entire pension account, we'll sell any investments remaining, unless you tell us otherwise in section 2 and 3. It's cheaper to sell your investments on our website. All you need to do is:
  1. Log into your account
  2. Select the green arrow next to your investment and follow the instructions
- We'll let your new provider know you're transferring and ask them for the details needed to transfer your pension.
- When your new provider sends us the details, we'll arrange for your pension to be transferred.

## Any questions?

☎ **0117 980 9926** ✉ [sipp@hl.co.uk](mailto:sipp@hl.co.uk) 🌐 [www.hl.co.uk](http://www.hl.co.uk)

AWPT1

### 1. Your details

|                                 |   |                                |
|---------------------------------|---|--------------------------------|
| Title (Mr/ Mrs, etc): <b>MR</b> | First name(s): <b>ASHLEY</b>                | Surname: <b>GORE</b>           |
| Postcode: <b>TS17 5FQ</b>       | HL client number (if known): <b>1893842</b> | Date of birth: <b>08/10/89</b> |

### 2. Transfer your pension

1 Pension account (select one): SIPP ☒ Drawdown ☐ Group SIPP ☐ PMS SIPP ☐ PMS Drawdown ☐

2 Are you transferring your entire pension? Yes ☒ No ☐ If no, enter the amount to be transferred here: £

3 How should your pension be transferred? sell my investments then transfer ☐ **OR** transfer my pension as it is ☒

### 3. Transfer your pension – complete to transfer another pension account

1 Pension account (select one): SIPP ☐ Drawdown ☐ Group SIPP ☐ PMS SIPP ☐ PMS Drawdown ☐

2 Are you transferring your entire pension? Yes ☐ No ☐ If no, enter the amount to be transferred here: £

3 How should your pension be transferred? sell my investments then transfer ☐ **OR** transfer my pension as it is ☐

### 4. Details of your new pension provider

|                                   |                           |
|-----------------------------------|---------------------------|
| Pension scheme name:              |                           |
| Pension type:                     | Policy number (if known): |
| Name of pension administrator:    |                           |
| Address of pension administrator: |                           |
|                                   | Postcode:                 |

### 5. Declaration and signature – please sign

- I confirm I wish to transfer my HL account(s) listed above to the Registered Pension Scheme shown above. I authorise Hargreaves Lansdown to provide the scheme administrator named above with any information they require in respect of this transfer.
- For cash transfers only, please accept this instruction to sell, to settle on the working day prior to transfer, any assets currently held in my HL SIPP including, where applicable, those held within the HL Group SIPP and the HL Portfolio Management Service (PMS) SIPP. I understand postal/telephone dealing charges will apply. The proceeds should be transferred to the scheme detailed above. Where applicable, I understand my cash will not be transferred until Hargreaves Lansdown has received any outstanding tax relief due to me from HM Revenue & Customs unless I provide specific instructions to the contrary.
- If I have requested a full transfer I understand 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.

- 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 Adviser.
- I confirm the information provided above is to the best of my knowledge true and complete.

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

Please sign here

**X** **A. Gore**

Date:

**07/06/23**