

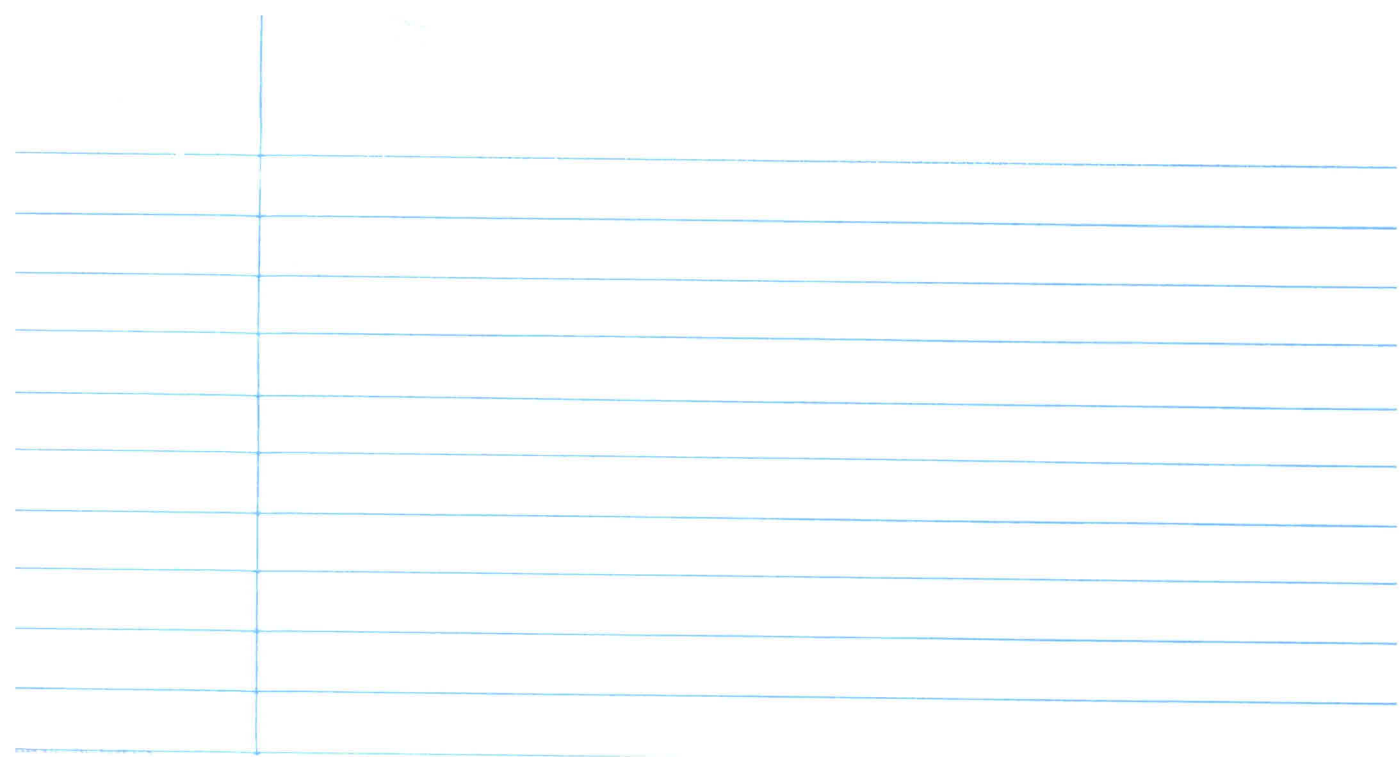
Joe Bloggs
TVO - on hold

Gina

This was referred to CJ. There are issues with the investments... (no returns paid on pref Shares, etc)
So it has been left with CJ to sort out.

Thanks,

Em.



PENSION TRANSFERS - Transfer existing pensions to the Vantage SIPP

EXTRA INFORMATION REQUIRED WHEN YOU TRANSFER A PENSION

Your employment status - Please show which is most applicable for your principal source of income.

Employed ☐ Self-Employed ☐ Pensioner ☐ Unemployed ☐ In full-time education ☐
Caring for one or more children under 16 ☐ Child under 16 ☐ Caring for a person aged 16 or over ☐ Other ☒

Male ☒ Female ☐

Marital Status **MARRIED**

Expected retirement age (optional) **60**

I confirm I have read, understood and agree to the declarations overleaf with regards to all policies I am transferring. I understand this form allows the transfer without further paperwork when possible.

X **Neil** SIGNATURE

X **11/12/17** DATE

PLAN DETAILS

Title (Mr, Mrs etc) **MR**

Full Name

NEIL WILLIAM GRAHAM

Address

THE OLD POST HOUSE

BURFORD ROAD, BLACK BOURTON, BAMPTON

Postcode

OX18 2PF

National Insurance No. **WM390463A**

Date of Birth **23 06 62**

Pension details

Pension Name

JOE BLOGS PROPERTY MANAGEMENT

Policy number **00812769RS**

Approx transfer value (£1,000 min) **£**

Tick if partial Transfer ☒

Pension type e.g. Stakeholder

SASS

Name and address of Scheme Administrator

PENSION PRACTITIONER

Tick if this is a drawdown policy ☒

I confirm: I have read the cash back terms and Transfer Checklist, checked if I will lose benefits or incur penalties and wish to transfer the policy listed above. • I have read, understood and agree to the Common Transfer Declaration. • Hargreaves Lansdown has not given me advice; I am responsible for my decision to transfer; and I will seek individual financial advice if I am unsure transferring is right for me. • I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

X **Neil** SIGNATURE

X **6/16/18** DATE

NEIL GRAHAM PRINT NAME

Any charges to transfer?

is free to transfer ISAs and funds from over 40 providers. Contact our Helpdesk or your existing provider to check transfer terms. If transferring a pension, please check you won't lose any valuable

falls, but if it rises you will not benefit from any growth while you hold cash.

The form overleaf enables you to choose whether you transfer ISAs, funds and shares as stock or cash – and enables you to transfer pensions as cash.

- Retirement annuity contracts (RACs)
- Executive pension plans (EPPs)
- Old protected rights pensions

For other types, call us on **0117 980 9926**.

WHAT WILL MY REFERENCE/ACCOUNT NUMBER LOOK LIKE?

Major Fund Groups Include:

Aberdeen, Allianz Global Investors, Artemis, Aviva, AXA, ~~BlackRock~~, Cazenove, F&C, GLG, Henderson, Invesco Perpetual, Investec, J.P. Morgan, Jupiter, Legg Mason, Liontrust, M&G, Martin Currie, Neptune, Old Mutual, Prudential, Rathbone, Royal London, Schroders, Standard Life Investments, SVM and Threadneedle.

Please note these examples are only for transfers of ISAs and/or funds/shares.

If your provider is not listed, and you are unsure, please contact your current provider before returning the form.

Company	Format of reference number	Example
Major Fund Groups (IFDS)	10 numbers which may have preceding zeros	0001234567
AXA Elevate	EL followed by 7 numbers	EL1234567
Barclays Smart Investor	ID, followed by 7 digits, hyphen followed by 3 digits	ID1234567-123
Best Invest	BI followed by 6 numbers	BI123456
Charles Stanley	7 numbers	1234567
Co Funds	1 letter followed by 6 or 7 numbers, A1 and a final letter	X123456A1X
Equiniti	8 numbers	12345678
Fidelity	4 letters followed by 6 numbers	ABCD123456
Old Mutual Wealth (Skandia)	5 - 9 numbers	123456789
Standard Life Wrap/Fund Zone	SP or WP followed by 7 numbers	SP1234567

One College Square South
Anchor Road
Bristol
BS1 5HL

Telephone: 0117 900 9000
www.hl.co.uk

Pension Practitioner.com
Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

08 June 2018

Our Ref: 2108420

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Pension Practitioner.com 00812769RS

**Member: Mr N W Graham , The Old Post House Burford Road Black Bourton Bampton
Oxfordshire OX18 2PF**

Transferring into: HL Vantage SIPP

~~Pension Scheme Tax Reference 00616238RC~~

Please find attached a letter of authority to enable our client to transfer the above policy to the HL Vantage SIPP. I would be grateful if you could send the necessary transfer out details to enable this to proceed.

If you do not require discharge forms, please provide us with details of the above policy and what you require to proceed with the transfer. If the transfer details can be provided in an electronic format please send this to the email address below.

Please note the Vantage SIPP cannot automatically accept transfers from the following schemes:

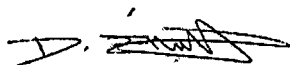
- AVCs linked to a Defined Benefit scheme, where the AVC can provide some or all of the main scheme Tax Free Cash entitlement
- Money Purchase schemes or Section 32 plans with an underpin or containing GMP or 9(2B) rights
- Cash Balance schemes

Please provide further details, including values, if the pension in question is one of those listed.

Additionally, please advise us if either the pension has been crystallised in full or part or if there is a court order attached to the plan.

If you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 980 9891 or at sipptransfers@hl.co.uk

Yours faithfully,



David Elliott
Hargreaves Lansdown Asset Management Ltd