

Vantage SIPP

Transfer Out Form



Part A - You should complete this part first

04.12

1. Your Details

Title(Mr/Mrs/Miss/etc)	MR	Surname	TRIMMER	Full forenames	MATTHEW RICHARD DAVID
National Insurance no.					
Postcode	KT8 0BQ		Date of birth	13 11 1969	
HL Client No.					

2. Details of your new pension scheme

Scheme name	MRDT PENSION	Type of pension	SASS	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

£

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).

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

- 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 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 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

Date

PART B - This section will be completed by your new pension provider

Your Details

Scheme name MRDT PENSION	Company name _____
Name and address of Scheme Administrator PENSION PRACTITIONER.COM	
DAWS HOUSE, 33-35 DAWSON LANE LONDON NW7 4SD	
Phone number 0800 634 6862	Contact name MR BRAD DAVES

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 MRDT PENSION FUND	Account number 61609501	Sort code 086068
Name and address of bank branch INVESTEC BANK PLC, 2 GRESHAM STREET		
LONDON	EC2V 7QP	Postcode EC2V 7QP
Cheque <input checked="" type="checkbox"/>	Policy number (if known)	
Please provide payee details: MRDT PENSION FUND		

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 Matthew P. Trimmer	Name MATTHEW RD TRIMMER
Position M.D.	Date 25 15 12012

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