



**BEST  
ONLINE SIPP  
PROVIDER**  
HARGREAVES  
LANDDOWN



# HARGREAVES LANDDOWN

Asset Management Ltd

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

One College Square South  
Anchor Road  
Bristol  
BS1 5HL

Telephone: 0117 980 9926  
www.hl.co.uk

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

25 March 2019

Our Ref: 1997649

## URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Pension Practioner.com NB869307C [Partial Transfer] PGB Pension Scheme  
Member: Mrs M Baker , 4 Steadings Rise Knutsford Cheshire WA16 0WB  
Transferring into: HL SIPP (PSTR - 00616238RC)

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

What we require from you (please email where possible):

<input type="checkbox"/>	Discharge Forms
<input type="checkbox"/>	Details of current scheme, including values
<input type="checkbox"/>	Details of any safeguarded benefits including the below*

\*Please note the HL 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

If you do not provide this information we will have to contact you again to confirm it.

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](mailto:sipptransfers@hl.co.uk)

Yours faithfully,

David Elliott  
Hargreaves Lansdown Asset Management Ltd



Quesy? Provider

**HARGREAVES  
LANSDOWN**

## Two-minute transfer form

### Transfer other pensions to your SIPP

To transfer other pensions to your HL SIPP read the Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration) then complete the form below. Return to our simple freepost address: **Freepost HARGREAVES LANSDOWN**. We will do the rest of the transfer work for you.

Your pension will be transferred as cash unless otherwise arranged. We will write to you when the transfer completes so you can choose your investments. Remember the value of investments can fall as well as rise so you may get back less than you invest. Before transferring, ensure you will not incur excessive exit fees or lose valuable benefits or guarantees.

Returning this form allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible. If you need additional forms, please photocopy more copies or call us.

**WHY NOT TRANSFER ONLINE?** Did you know you can apply to transfer online? Log in to your account at [www.hl.co.uk](http://www.hl.co.uk) and select 'Transfer to HL'

Vanta  
14 MAR 2019

Policy one – Transfer to the HL SIPP		AWST1
Title (Mr/Mrs /Miss/etc) <b>MRS</b>	Full name <b>MARCIA CAROLINE BAKER</b>	
Nationality <b>BRITISH</b>		
Address <b>4 STEADINGS RISE, MERE CHESHIRE</b>		
Postcode <b>WA16 0WB</b>	Date of birth <b>18 / 10 / 1963</b>	
National Insurance no. <b>NB 8 6 9 3 0 7 C</b>		
Pension details Pension Name <b>PCB PENSION SCHEME</b>		
Policy number	Tick if this is a drawdown policy	
Pension type e.g. Stakeholder <b>SSAS</b>		
Approx. transfer value (exact amount if partial transfer) £ <b>88,000</b>	Tick if partial transfer <input checked="" type="checkbox"/>	
Name and address of administrator <b>PENSION PRACTITIONER OFFICE 12, VENTURE WALES BUILDINGS, PENTREBACH</b>		
Postcode <b>MERTHYR CF48 4DR</b>		
<b>I confirm:</b> <ul style="list-style-type: none"> <li>I have read the Transfer Checklist and checked if I will lose benefits or incur penalties and wish to transfer the policy listed above.</li> <li>I have read, understood and agree to the Common Transfer Declaration.</li> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to transfer and I will seek personal financial advice if I am unsure transferring is right for me.</li> <li>I have read, agreed to and retained the Key (Investor) Information Document of my chosen investments (where available), including all costs and charges, provided to me at <a href="http://www.hl.co.uk">www.hl.co.uk</a> or on paper.</li> <li>I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.</li> </ul>		
<input checked="" type="checkbox"/> <b>CB</b>	Date <b>14 / 2 / 19</b>	

Policy two – Transfer to the HL SIPP		AWST1
Title (Mr/Mrs /Miss/etc)	Full name	
Nationality		
Address		
Postcode	Date of birth / /	
National Insurance no.		
Pension details Pension Name		
Policy number	Tick if this is a drawdown policy	
Pension type e.g. Stakeholder		
Approx. transfer value (exact amount if partial transfer) £	Tick if partial transfer	
Name and address of administrator		
Postcode		
<b>I confirm:</b> <ul style="list-style-type: none"> <li>I have read the Transfer Checklist and checked if I will lose benefits or incur penalties and wish to transfer the policy listed above.</li> <li>I have read, understood and agree to the Common Transfer Declaration.</li> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to transfer and I will seek personal financial advice if I am unsure transferring is right for me.</li> <li>I have read, agreed to and retained the Key (Investor) Information Document of my chosen investments (where available), including all costs and charges, provided to me at <a href="http://www.hl.co.uk">www.hl.co.uk</a> or on paper.</li> <li>I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.</li> </ul>		
<input checked="" type="checkbox"/>	Date / /	

1218

MAIN CONTACT AT PENSIONER PRACTITIONER:  
 GEORGINA STULIGHOWA TEL: 0800 634 4862  
 EMAIL: [georginas@pensionpractioner.com](mailto:georginas@pensionpractioner.com)