



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.

Asset Management Ltd
One College Square South,
Anchor Road,
Bristol,
BS1 5HL

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

Pension Practitioner.com
Daws House
33-35 Daws Lane
London
NW7 4SD

27 April 2016

Our Ref: 1997649

URGENT - COMPLETED TRANSFER FORMS ENCLOSED

Dear Sir/Madam

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

Thank you for informing us that you do not require completed transfer forms to release the policy stated above. Please send the transfer value to the account detailed below. If charges will apply to this bank payment, please issue a cheque.

Please provide confirmation of the value at the time of payment. This can be faxed to 0117 980 9888 or emailed to sipptransfers@hl.co.uk If you require further documentation to complete this transfer, please contact us immediately.

Bank: Lloyds Bank Account name: HLAM LTD SIPP TRUSTEE VANTAGE CLIENT A/C
Account number: 03310401 Sort Code: 30-92-13
Payment ref: 1997649 Baker

Please ensure that you quote this exact reference – if we are unable to match the payment with the above client then this could result in the funds being returned to you.

The HL Vantage SIPP is a Personal Pension Scheme registered under chapter 2 part 4 of the Finance Act 2004 (as amended). You have an obligation to confirm your Pension Scheme Tax Reference Number in relation to this policy.

Warning: if benefits have been crystallised or any tax free cash paid please do not proceed with the transfer and contact us immediately.

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,

Natasha Henderson
Hargreaves Lansdown Asset Management Ltd

Hargreaves Lansdown
Asset Management Ltd
One College Square South
Anchor Road
Bristol
BS1 5HL

Vantage SIPP
27 APR 2016

22 April 2016

Dear Tim,

Member: Mrs. M Baker
Scheme Name: PGB SSAS
Transferring into: HL Vantage SIPP (PSRT 00616238RC)
Your Ref: 1997649

With reference to your letter of 15 April 2016, please see enclosed completed transfer form for the above client.

I can confirm that the policy is part of a Small Self Administered Scheme and:

- 1) The member has not taken benefits from the above plan
- 2) The member is not entitled to a pension commencement lump sum in excess of 25%
- 3) The member is not the sole member of the scheme
- 4) N/A – Partial transfer only
- 5) The above plan does not contain any property
- 6) There are no loans or deficits on the plan

We do not require any Discharge Forms. Please advise the bank details as to where the transfer payment should be made to. We will require the following details:-

Amount
Name of Bank
Account Name
Account Number
Sort Code
Reference

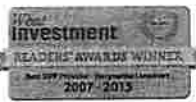
Yours sincerely



Emily McAlister

For Pension Practitioner. Com

Enc.



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15 April 2016

Our Ref: 1997649

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Pension Practitioner.com NB869307C PGB SSAS [Partial Transfer]
Member: Mrs M Baker, 4 Steadings Rise Knutsford Cheshire WA16 0WB
Transferring into: HL Vantage SIPP (PSTR – 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.

We understand the above policy is part of a Small Self Administered Scheme. I would be grateful if you could therefore **provide the following information** with the discharge forms:

- 1) Has the member taken benefits from the above plan?
- 2) Is the member entitled to a pension commencement lump sum in excess of 25%?
- 3) Is the above member the sole member of the scheme?
- 4) Confirmation that the ceding scheme trustees and administrators will handle all aspects of the winding up of the above SSAS.
- 5) Does the above plan contain any property?
- 6) Are there any loans or deficits on the plan? If so, these must be settled before the transfer takes place.

In the event the above policy is not a SSAS scheme I would be grateful if you could contact us at your earliest convenience to confirm this as the details we require differ with the type of scheme being transferred.

Please **DO NOT ISSUE A CHEQUE** at this point; we are unable to accept the transfer without this information.

If there is a court order attached to the plan, please contact us before proceeding.

If benefits have been crystallised or any tax free cash paid please also do not proceed with the transfer and contact us immediately.

If you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 9809926 or at sipstransfers@hl.co.uk

Yours faithfully,

Tim Cheung
Hargreaves Lansdown Asset Management Ltd

Two-minute transfer form

Transfer other pensions to your SIPP

To transfer other pensions into your Vantage 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. Complete a separate form for each policy you wish to transfer. If you need additional forms, please print more copies.

FREE CROSS PEN SET WORTH £125



Transfer pensions worth £10,000 or more to the Vantage SIPP and receive this Cross pen set worth £125 as a thank you. To qualify automatically, return this application by 30 October 2015. If you need longer, contact us before you apply as we might be able to extend the offer. Your pen set will be sent when all your transfers complete.

Policy one - Transfer to the Vantage SIPP

Title (Mr/Mrs/Miss/etc) **MRS** Surname **BAKEE**
Full forename(s) **MARCIA CAROLINE**
Address **4 STEADINGS RISE, MERE, CHESHIRE**
Postcode **WA6 0WB** Date of birth **16/10/63**
National Insurance no. **NA B 2 6 9 3 0 7 C**
Pension Scheme Name **PCB PENSION SCHEME**
Policy number **00757896RQ** (PENSION SUGGESTED TAX REF) Tick if this scheme is in Drawdown ☐
Scheme type **SSAS**
Approx. transfer value (exact amount if partial transfer) £ **50,000** Tick if partial transfer ☒
Name and address of administrator **C/O BRAD DAVIS PENSION PRACTITIONER.COM**
DAWS HOUSE, 33-35 DAWSHANE, LONDON
Postcode **NW7 4SD**

I confirm:

- I have read the 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 personal financial advice if I am unsure transferring is right for me.
- Where I am investing in a fund or an ETF, I am doing so on the basis of the information contained in the Key Features, Simplified Prospectus or Key Investor Information Document provided to me on paper, CD rom or via www.hl.co.uk.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

☒ **9/1/16** Date ☒ **13/14/16**

Policy two - Transfer to the Vantage SIPP

Title (Mr/Mrs/Miss/etc) Surname
Full forename(s)
Address
Postcode Date of birth / /
National Insurance no.
Pension Scheme Name
Policy number Tick if this scheme is in Drawdown
Scheme type
Approx. transfer value (exact amount if partial transfer) £ Tick if partial transfer
Name and address of administrator
Postcode

I confirm:

- I have read the 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 personal financial advice if I am unsure transferring is right for me.
- Where I am investing in a fund or an ETF, I am doing so on the basis of the information contained in the Key Features, Simplified Prospectus or Key Investor Information Document provided to me on paper, CD rom or via www.hl.co.uk.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

☒ Date ☒ / /