

1997649

SIPP TWO-MINUTE TRANSFER FORM

HARGREAVES
LANSDOWN

Before transferring please read the SIPP Key Features, including:

- ✓ Important Investment Notes
- ✓ Transfer Checklist
- ✓ Common Transfer Declaration

It's also really important to make sure you won't lose any valuable guarantees or benefits from your current pension provider or have to pay excessive exit fees. We wouldn't want you to lose money.

If you're over 55 and plan to access your pension as a direct result of this transfer, or you're transferring a pension that's already in

drawdown you'll need to complete a set of risk questions before you apply. You can do this by calling us on 0117 980 9926.

We'll transfer your pension as cash (unless you request otherwise), which means it won't be affected by any stock market rises or falls for a period. Once your transfer is complete, you can choose your investments.

If you're transferring a pension that's already in drawdown you'll need to complete a set of risk questions before we send you a drawdown application. You can do this by calling us on 0117 980 9926.

We'll write to you to let you know when your transfer completes.

GOT ONLINE ACCESS?

If you're a client, the fastest way to transfer a pension is online. All you need to do is:

1. Visit www.hl.co.uk/sipp-transfer
2. Select 'transfer your pension now'

Policy 1 - transfer to the HL SIPP

AWST1

Title (Mr, Mrs, etc):	MRS	First name(s):	MARCIA CAROLINE	Surname:	BAKER													
Address:				Postcode:														
4 STEADINGS RISE, MERE, CHESHIRE				WA16 0WB														
Date of birth:	1	8	1	0	6	3	National Insurance No.	N	B	8	6	9	3	0	7	C	Nationality:	BRITISH

Pension details

Pension name:	PCB PENSION SCHEME	Policy number:	
Approx. value of funds in drawdown £		<input checked="" type="checkbox"/> Tick if partial transfer	£76,000
Approx. value of funds not in drawdown £			
Pension type: e.g. Stakeholder	SSAS	<input type="checkbox"/> Tick if this is a drawdown policy	
Name and address of administrator:	RETIREMENT CAPITAL, OFFICE 12, VENTURE WALES BUILDING, PENTREBACH, MERTHYR TYDFIL	Postcode:	CF48 4DR

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.
- 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 www.hl.co.uk or on paper.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

Please sign here	X M Baker	Vantage SIPP	17 AUG 2022	Date:	1	5	0	8	2	2
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Policy 2 - complete if you want to transfer another pension

AWST1

Title (Mr, Mrs, etc):		First name(s):		Surname:												
Address:				Postcode:												
Date of birth:				National Insurance No.											Nationality:	

Pension details

Pension name:		Policy number:	
Approx. value of funds in drawdown £		<input type="checkbox"/> Tick if partial transfer	
Approx. value of funds not in drawdown £			
Pension type: e.g. Stakeholder		<input type="checkbox"/> Tick if this is a drawdown policy	
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.
- 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 www.hl.co.uk or on paper.
- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

Please sign here	X	Date:							
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If you have any questions call us on 0117 980 9926, visit www.hl.co.uk or email us at sipp@hl.co.uk

Return to our simple freepost address (no stamp needed): Freepost HARGREAVES LANSDOWN

0622

MAIN CONTACT AT RETIREMENT CAPITAL: GEORGINA STULIGLOWA
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