

Hargreaves Lansdown is a trading name of Hargreaves Lansdown Asset Management Limited (a wholly-owned subsidiary of Hargreaves Lansdown plc), authorised and regulated by the Financial Conduct Authority. The company is registered in England and Wales with company number 01896481, with its registered office at the address shown.

**HARGREAVES
LANDSOWN**

SIPP Transfers

One College Square South
Anchor Road
Bristol
BS1 5HL

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

Retirement Capital
Pension Practitioner Venture Wales
Merthyr Tydfil Industrial Park
Pentrebach
Merthyr Tydfil
Mid Glamorgan
CF48 4DR

24 July 2024
Our Ref: 2389344

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Retirement Capital YM969697A [Partial Transfer]
Member: Mr P G Baker, 4 Steadings Rise Mere 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. **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. If the above client is the sole member of the SSAS and it is being wound up, we understand that the ceding scheme trustees and/or administrators will handle all aspects of the wind up.

If the SSAS contains any property or there is a court order, loan or deficit 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.

In the event the above policy is not a SSAS scheme I would be grateful if you could contact us as soon as possible, 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 you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 9809926 or at sipptransfers@hl.co.uk

Yours faithfully,

Paul Adrian
Hargreaves Lansdown Asset Management Ltd

19 JUL 2024

HARGREAVES
LANSDOWN

SIPP TWO-MINUTE TRANSFER FORM

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

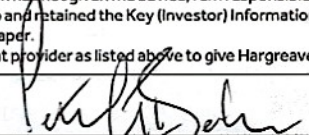
GOT ONLINE ACCESS?

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):	MA	First name(s):	PETER GEOFFREY	Surname:	BAKER	
Address:	4 STEADINGS RISE MERE CHESHIRE				Postcode:	WA16 0WB
Date of birth:	081149	National Insurance No.	YM969697A	Nationality:	BRITISH	
<input checked="" type="checkbox"/> Transfer your pension as cash <input type="checkbox"/> Transfer your pension investments						
Pension details						
Pension name:	PGB PENSION SCHEME				Policy number:	
Approx. value of funds in drawdown £	/				<input checked="" type="checkbox"/> Tick if partial transfer	
Approx. value of funds not in drawdown £	63,000					
Pension type: e.g. Stakeholder	SSAS				<input type="checkbox"/> Tick if this is a drawdown policy	
Name and address of administrator:	RETIREMENT CAPITAL VENTURE WALES, BUILDING, MERTHYR TYDFIL, INDUSTRIAL BUSINESS PARK, MERTHYR TYDFIL WALES				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					Date:	170724

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Paul Adrian
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