HARGREAVES LANSDOWN

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

16 August 2017

Our Ref: 2389344

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: YM969697A PGB PENSION SCHEME
Member: Mr P G Baker 4 Steadings Rise Mere Knutsford Cheshire WA16 0WB
Transferring into HL Vantage SIPP (PSTR – 00616238RC)

We have recently contacted your company and requested the necessary discharge forms in order to transfer the above policy. A transfer authority signed by the client was also attached to the request enabling you 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.**

Our records show that as yet we have not received the required forms from you. I would therefore be grateful if you could send the discharge forms to us as soon as possible. If you have previously sent us the forms, unfortunately these have not been received.

If there will be a delay in providing the discharge forms, please contact us so that we can update our records accordingly.

Thank you for your assistance in this matter. If you have any further queries on this, please do not hesitate to contact me on 0117 980 9891 or by email at sipptransfers@hl.co.uk.

Yours sincerely

Sally Davies
Hargreaves Lansdown Asset Management Ltd

HL Ref: 2389344 transfer from **YM969697A PGB PENSION SCHEME**

☐ The transfer instruction has been received and we enclose a copy of the discharge forms

☐ We cannot locate the client using the details provided above

☐ We have been unable to proceed with the transfer for the following reason(s):

    ☐ DOB differs   ☐ NINO differs   ☐ Address differs   ☐ Incorrect Ref No   ☐ Name differs

        ☐ Identity documentation required (*please provide details below*)
        ☐ Client no longer holds any assets in this account.
        ☐ We have not received your initial transfer request. Please resend a copy.
    ☐ Other: