

Policy one - Transfer to the Vantage SIPP

Title (Mr/Mrs
/Miss/etc)

Surname

BAKER

Full forename(s)

PETER GEOFFREY

Address

4 STADINGS RISE, MERE,
CHESHIRE

Postcode

WA16 0WB

Date of
birth

08 / 11 / 49

National

Insurance no.

Y M 9 6 9 6 9 7 A

**Pension
details**

Pension
Name

PCB PENSION SCHEME

Policy
number

(AS ABOVE)

Tick if this is a
drawdown policy

Pension type
e.g. Stakeholder

SSAS

Approx. transfer value

(exact amount if partial transfer) £ 35,000

Tick if partial
transfer

Pension administrator
name and address

PENSION PRACTITIONER.COM LTD

DAWS HOUSE, DAWS LANE,

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 or Key Investor Information Document provided to me on paper or via www.hll.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.

X

Peter Geoffrey Baker

Date

X 25 10 17



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Pension Practitioner.com
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NW7 4SD

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One College Square South,
Anchor Road,
Bristol,
BS1 5HL

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

01 August 2017

Our Ref: 2389344

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Pension Practitioner.com YM969697A PGB PENSION SCHEME [Partial Transfer]
Member: Mr P G Baker , 4 Steadings Rise Mere Knutsford Cheshire WA16 0WB
Transferring into: HL Vantage SIPP
Pension Scheme Tax Reference – 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.

Please note the Vantage 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

Please provide further details, including values, if the pension in question is one of those listed.

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

Yours faithfully,

David Elliott
Hargreaves Lansdown Asset Management Ltd