



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

18 March 2017

Our Ref: 2389344

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Pension Practioner.com 00787896RQ/YM969697A [Partial Transfer]
Member: Mr P G Baker , 4 Steadings Rise Mere 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. 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,

Alex Fairbairn
Hargreaves Lansdown Asset Management Ltd

Complete to transfer a pension to the Vantage SIPP

Office use only

IT130

IMPORTANT: if you do not already have a Vantage SIPP please also complete the application form on page 15.

Please read the enclosed Transfer Checklist and Common Transfer Declaration contained within the Important Investment Notes first. Returning these forms allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible.

Complete a separate form for each policy you transfer (for additional forms call 0117 980 9926 or make a photocopy). Already have an online account with us? Log in at www.hl.co.uk to transfer online.

Policy 1 Transfer to the Vantage SIPP IT130

Title (Mr, Mrs etc)	MR	Full Name	BAKER
Address			
4 STEADINGS RISE, MERE			
CHESHIRE		Postcode	WA16 0WB
Date of Birth	08 11 49		
National Insurance No.	YM969697A		

Pension details	Scheme Name	PGB PENSION SCHEME	
Policy number	00787896RQ		
Scheme type e.g. Stakeholder	SSAS	Tick if in drawdown	<input checked="" type="checkbox"/>
Transfer value (if partial transfer, enter exact amount)	£100,000	Tick if partial transfer	<input checked="" type="checkbox"/>
Scheme Administrator name and address	PENSION PRACTITIONER.COM DAWS HOUSE, 33-35 DAWS LANE, LONDON 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 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.

☒ I have signed here ☒ 10.03.17

Policy 2 Transfer to the Vantage SIPP IT130

Title (Mr, Mrs etc)	Full Name
Address	
Postcode	
Date of Birth	
National Insurance No.	

Pension details	Scheme Name
Policy number	
Scheme type e.g. Stakeholder	
Transfer value (if partial transfer, enter exact amount)	£13 MAR 2017
Scheme Administrator name and address	

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 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.

☒ PLEASE SIGN HERE ☒ DATE