

SIPP Transfers

One College Square South
Anchor Road
Bristol
BS1 5HL

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

Ms G Stuliglowa
Pension Practitioner
Pension Practitioner Venture Wales
Merthyr Tydfil Industrial Park
Pentrebach
Merthyr Tydfil
Mid Glamorgan
CF48 4DR

11 March 2021
Our Ref: 2005329

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Pension Practitioner VIR11223320012235
Member: Miss J Bedford, 4 Priory View Paper Mill Yard Norwich NR1 2GA
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,



Mark Dawnay
Hargreaves Lansdown Asset Management Ltd

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.

Transfer options

- **Transfer your pension as cash** – your provider will sell your investments, then transfer the cash amount. You will not be invested during the transfer, so will not make gains or losses.

Once your transfer is complete you'll be able to buy investments. This type of transfer usually takes 2-4 weeks depending on your provider.

- **Transfer your pension investments** – all your investments and cash will be transferred. You will be invested during the transfer, so you could make gains or losses. Usually you cannot trade until your transfer is complete.

This type of transfer usually takes 6-8 weeks, depending on your investments and provider. If you select this option we will convert any funds transferred to the lowest cost version we offer. We will never convert you into a fund that's more expensive than the one you already hold.

There are no charges or tax to pay. Before transferring please read about converting funds at www.hl.co.uk/convert.

We'll contact you to cover your options if your provider cannot transfer your pension investments or you hold an investment we do not offer.

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.

Policy 1 – transfer to the HL SIPP

AWST2

Title (Mr, Mrs, etc):	MISS	First name(s):	JOANNE	Surname:	BEDFORD													
Address:	4 PRIORY VIEW, NORWICH		Postcode:	NR1 2QA														
Nationality:	BRITISH																	
Date of birth:	1	2	1	2	0	9	National Insurance No.	N	9	4	8	8	6	7	4	A	Tick here if you have no NI No.	<input type="checkbox"/>

Pension details

- ☒ Transfer your pension as cash ☐ Transfer your pension investments

Pension name:	JBPF Ltd		Policy number:	VIR112233 200 12235	
Approx. value of funds in drawdown £	10,000		Approx. value of funds not in drawdown £	5,200	
Pension type: e.g. Stakeholder	SSAG		Tick if partial transfer	<input type="checkbox"/>	
Name and address of administrator:	Pension Practitioner, Office 12, Venture Wales Building, Pentrebach		Tick if this is a drawdown policy	<input type="checkbox"/>	
Postcode:	CF49 4DR				

I confirm

- I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.
- 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 [Signature]

02 MAR 2021

Date: 2 6 0 2 2 1

Policy 2 – complete if you want to transfer another pension

Title (Mr, Mrs, etc):	First name(s):	Surname:
Address:	Postcode:	Nationality:
Date of birth:	National Insurance No.	Tick here if you have no NI No.

Pension details

- ☐ Transfer your pension as cash ☐ Transfer your pension investments

Pension name:	Policy number:
Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £
Pension type: e.g. Stakeholder	Tick if partial transfer
Name and address of administrator:	Tick if this is a drawdown policy
Postcode:	

I confirm

- I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.
- 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 [Signature]

Date: [] [] [] [] [] []

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