

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

01 April 2021
Our Ref: 2389344

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

**Existing Policy: Pension Practitioner 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,



Eleanor Watson
Hargreaves Lansdown Asset Management Ltd

2389344

Before transferring please read the enclosed 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.

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 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.

CASHBACK AVAILABLE

Transfer pensions worth £5,000+ to the HL SIPP and we'll pay you between £50 and £500 as a thank you. The money doesn't come from your account.

To qualify automatically, apply by 3 September 2019. However, if you need more time to decide, let us know and we will extend the deadline by up to six months - call 0117 980 9926 or email transferoffer@hl.co.uk

Your cashback will be paid after the offer closes and your transfer the completes. If you close your account within a year, we may ask you to repay the cashback. For offer terms, see page 15 of the enclosed Terms and Conditions.

The more you transfer, the more you receive.

YOU TRANSFER	WE PAY YOU
£5,000 – £24,999	£50
£25,000 – £49,999	£75
£50,000 – £99,999	£100
£100,000 – £149,999	£250
£150,000 +	£500

Policy 1 – transfer to the HL SIPP SCCB3

Title (Mr, Mrs, etc.): **Mr** First name(s): **(PG) PETER GEOFFREY** Surname: **Baker**

Address: **4 Steadings Rise, Mere, Knutsford, Cheshire** Postcode: **WA16 0WB**

Date of birth: **081149** National Insurance No. **YM969697A** Nationality: **BRITISH**

Pension details Pension name: **PG PENSION SCHEME** Policy number:

Approx. value of funds in drawdown £: **SSAS** Approx. value of funds not in drawdown £: **41,000** *Exact amount for transfer only*

Pension type: **SSAS** Tick if partial transfer Tick if this is a drawdown policy

Name and address of administrator: **PENSION PRACTITIONER, OFFICE 12 VENTURE WALES BUILDING, PEATREBACH, MERLNYR** Postcode: **CF48 4DR**

I confirm

- I have read the cashback terms, 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 *[Signature]* Date: **230321**

Policy 2 – complete if you want to transfer another pension SCCB3

Title (Mr, Mrs, etc.): _____ First name(s): _____ Surname: _____

Address: _____ Postcode: _____

Date of birth: _____ National Insurance No. _____ Nationality: _____

Pension details Pension name: _____ Policy number: _____

Approx. value of funds in drawdown £: _____ Approx. value of funds not in drawdown £: _____

Pension type: _____ Tick if partial transfer Tick if this is a drawdown policy

Name and address of administrator: _____ Postcode: _____

I confirm

- I have read the cashback terms, 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 *[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