

SIPP Transfers

One College Square South  
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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

31 August 2021  
Our Ref: 1997649

**URGENT**

**Pension Transfer: Request for Discharge Forms**

Dear Sir/Madam

**Existing Policy: Pension Practitioner NB869307C [Partial Transfer]  
Member: Mrs M Baker , 4 Steadings Rise 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](mailto:sipptransfers@hl.co.uk)

Yours faithfully,

  
Christopher Dark  
Hargreaves Lansdown Asset Management Ltd

**HARGREAVES  
LANDOWN**

# Two-minute transfer form

## Transfer other pensions to your SIPP

To transfer other pensions to your HL SIPP read the Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration) then complete the form below. Return to our simple freepost address: Freepost HARGREAVES LANDOWN. We will do the rest of the transfer work for you.

Your pension will be transferred as cash unless otherwise arranged. We will write to you when the transfer completes so you can choose your investments. Remember the value of investments can fall as well as rise so you may get back less than you invest. Before transferring, ensure you will not incur excessive exit fees or lose valuable benefits or guarantees.

Returning this form allows the transfer of the plan(s) below to Hargreaves Lansdown without further paperwork, when possible. If you need additional forms, please photocopy more copies or call us.

**WHY NOT TRANSFER ONLINE?** Did you know you can apply to transfer online? Log in to your account at [www.hl.co.uk](http://www.hl.co.uk) and select 'Transfer to HL'.

Vantage

25 AUG 2021

### Policy one - Transfer to the HL SIPP

Title (Mr/Mrs/Miss/etc) **MRS** Full name **MARCIA CAROLINE BAKER**

Nationality **BRITISH**

Address **4 STEADINGS RISE, MERE  
CHESHIRE**

Postcode **WA16 0WB** Date of birth **18 / 10 / 1963**

National Insurance no. **NB 8 6 9 3 0 7 C**

Pension details Name **PGB PENSION SCHEME**

Policy number **SSAS** Tick if this is a drawdown policy ☐

Pension type eg Stakeholder **SSAS**

Approx. transfer value (exact amount if partial transfer) **£ 75,000** Tick if partial transfer ☒

Name and address of administrator **PENSION PRACTITIONER  
OFFICE 12, VENTURE WALKS  
BUILDINGS, PENTREBACH  
MERTHYR TYDFIL** Postcode **CF48 4DR**

I confirm:

- I have read the Transfer Checklist and 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](http://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.

**X** **M Baker** Date **23 18 12 1**

### Policy two - Transfer to the HL SIPP

Title (Mr/Mrs/Miss/etc) **Full name**

Nationality

Address

Postcode **1 1** Date of birth **1 1**

National Insurance no.

Pension details Name

Policy number **SSAS** Tick if this is a drawdown policy ☐

Pension type eg Stakeholder

Approx. transfer value (exact amount if partial transfer) **£** Tick if partial transfer ☐

Name and address of administrator

Postcode

I confirm:

- I have read the Transfer Checklist and 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](http://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.

**X** **1 1** Date **1 1**

MAIN CONTACT AT PENSIONER PRACTITIONER;  
GEORGINA STULIGLOWA TEL: 0800 634 4862  
EMAIL: [georginas@pensionpractitioner.com](mailto:georginas@pensionpractitioner.com)