

Hargreaves Lansdown is a trading name of Hargreaves Lansdown Asset Management Limited (a wholly-owned subsidiary of Hargreaves Lansdown plc), authorised and regulated by the Financial Conduct Authority. The company is registered in England and Wales with company number 01896481, with its registered office at the address shown.

**HARGREAVES  
LANDSOWN**

SIPP Transfers

One College Square South  
Anchor Road  
Bristol  
BS1 5HL

Telephone: 0117 980 9926  
[www.hl.co.uk](http://www.hl.co.uk)

Registered Scheme Administrator Ltd  
Office 12  
Venture Wales Building  
Pentrebach  
Merthyr Tydfil  
CF48 4DR

Our Ref: TO/2057017  
Your Ref: Terence  
Hanrahan  
23 December 2021

Dear Sir or Madam

In order for us to be able to proceed with the transfer, please could you complete the enclosed transfer out form and return it to us along with the scheme rules.

We thank you in advance for your assistance and look forward to hearing from you. Should you have any queries please do not hesitate to contact us on 0117 980 9916 or email [hltransferout@hl.co.uk](mailto:hltransferout@hl.co.uk).

Yours faithfully



Davis Vaivods  
HL Transfer Out Team

# HL SIPP TRANSFER OUT FORM (NEW PROVIDER)

HARGREAVES  
LANSDOWN

## 1. New pension provider's details

Scheme name:		Company name:	
Name and address of Scheme Administrator:			
Phone number:		Contact name:	
Client name:		Date of birth:	Client number (if known):

## 2. Scheme type – tick all that apply

☐ **SIPP/SSAS** – please provide stockbroker details separately for transferring investments.

☐ **100% insured** – Transfer cheque may only be payable to the scheme administrator or the insurance company involved.

☐ **Retirement Annuity** – It is not possible for a scheme formerly approved as a retirement annuity contract under Chapter 3 Part 14 Income and Corporation Taxes Act 1988 to accept a transfer from the HL SIPP.

☐ **Occupational Money Purchase (other than SSAS)** – please provide stockbroker details separately for transferring investments.

☐ **Deferred annuity/section 32 buy out** – For this option, by signing the declaration you are also confirming that you are an insurance company authorised to carry out long term business in the UK.

☐ **Other** – Please specify the nature of your scheme:

## 3. Scheme registration

We confirm the above scheme is registered under Chapter 2 of Part 4 of Finance Act 2004 or deemed to be so registered by virtue of paragraph 1 (1) of Schedule 36 Finance Act 2004.

Pension scheme tax reference (PSTR):

## 4. Bank details – select one option


☐ **Electronic – provide bank details below**

Account name:		Sort code:	
Account number:		Payment reference:	
Name and address of bank branch:		Postcode:	

☐ **Cheque** Payee details:

## 5. Declaration – please read and sign

We declare the above information is true and complete and we are willing and able to accept this transfer. We confirm the funds transferred will be applied to provide benefits consistent with the legislation covering Registered Pension Schemes. We give permission for HMRC to provide the scheme administrator of the HL SIPP with information relating to the status and registration of our scheme.

Please sign here		Date:	

### Ceding Scheme Details:

**Full Name:** HL SIPP

**Scheme Type:** Self Invested Personal Pension (Deemed as registered by virtue of paragraph 1(1) of Schedule 36 of the Finance Act 2004).

**Pension Scheme Tax Reference (PSTR):** 00616238RC