

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. We wouldn't want you to lose money.

If you're over 50 and plan to access your pension as a direct result of this transfer, or you're transferring a pension that's already in drawdown you'll need to complete a set of risk questions before you apply. You can do this by calling us on **0117 980 9926**.

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**.

Got online access?

If you're a client, the fastest way to transfer a pension is online. All you need to do is:

1. Visit www.hl.co.uk/sipp-transfer
2. Select 'transfer your pension now'

Section 1 – details of the pension you're transferring

AWST1

Title (Mr, Mrs, etc):	First name(s):	Surname:
Address:		Postcode:
Date of birth:	<div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div>	National Insurance No. <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div> Nationality:
<input type="checkbox"/> Transfer your pension as cash		<input type="checkbox"/> Transfer your pension investments

Pension details

Pension name:	Policy number:
Approx. value of funds £	<input type="checkbox"/> Tick if partial transfer
Pension type: e.g. Stakeholder	
Name and address of administrator:	Postcode:

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.
- 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:

D

D

M

M

Y

Y

Section 2: tell us where your pension should go – you can invest in our ready-made plan or leave your pension as cash to invest later

Leave blank if you're transferring pension investments from another provider.

You can invest in the HL Ready-Made Pension Plan or leave your pension as cash and choose your own investments.

About the HL Ready-Made Pension Plan

If you're not sure where to invest, we've designed the HL Ready-Made Pension Plan to help you get started. It's a simple, low-cost option that's managed by experts.

It aims to grow your money in the earlier years, then lower risk as you get closer to retirement. To do that, it's made up of two funds with a range of investments.

The HL Ready-Made Pension Plan is designed for people who:

- want to take control of their pension but don't know where to invest
- need experts to make the day-to-day decisions
- are comfortable with medium-high investment risk for growth
- want lower investment risk closer to retirement age
- can review their investments at least once a year

The plan has not been designed to meet your individual needs or goals, so consider other investments if the plan does not meet your needs. If you're not sure what's right for your circumstances, you should ask for financial advice.

Please read the Key Investor Information Documents (KIID) included before investing. You can read more information at www.hl.co.uk/rmpp

Where should the money you're adding to your pension go?

<input type="checkbox"/> Invest everything in the HL Ready-Made Pension Plan	OR	<input type="checkbox"/> Leave everything as cash and choose investments later
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We'll leave your pension as cash if you do not choose an option and you're not transferring pension investments from another provider.

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**