

# WORKPLACE PENSION TRANSFER FORM

HARGREAVES  
LANSDOWN

## Application to transfer other pensions to your HL Workplace pension (the HL SIPP)

Before transferring you should read the HL SIPP Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration).

You should check the benefits of your HL SIPP will be at least as good as your current pension. In particular, whether you would lose any bonuses or guarantees or suffer an unacceptably high penalty.

**Returning this form allows the transfer of the pension below to HL without further paperwork, when possible.**

We'll write to you if there are additional forms to complete.

If any of your benefits are in an 'occupational pension' we may need you to contact the company with which you had your pension. We'll let you know if this is necessary.

By using this form, we assume that you don't plan to access your pension as a direct result of this transfer. If you're over 55 and would like to access your pension as a result of this transfer, contact us on **0117 314 1795**.

Please return to: Freepost HARGREAVES LANSDOWN. (the address really is that simple)

### 1. Transfer to your HL Workplace pension

**TO TRANSFER MORE THAN ONE POLICY, PLEASE PHOTOCOPY OR REPRINT THIS DOCUMENT.**

Title (Mr/ Mrs, etc):	Surname:	Full Forename(s):
Address:		Postcode:
Date of birth:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	NI number:
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Your Employer:		Nationality:

Tick here if you  
have no NI number

#### Details of the pension to transfer

Scheme Name:	Policy number:	Tick here if this scheme is in Drawdown <input type="checkbox"/>
Type of scheme: (e.g. Stakeholder/FSAVC)	Tick if partial transfer <input type="checkbox"/>	Partial transfer value (£)
Name and address of provider:		Postcode:

#### Your declaration

##### I confirm:

##### To current pension provider:

- Please accept this as my authority for you to provide HL with any information they require about my membership of the above scheme.

##### To Hargreaves Lansdown:

- I confirm that I have read the Transfer Checklist and have checked whether I will lose any benefits or incur any penalties; and wish to transfer the above policy.
- I have read, understood and agree to the Common Transfer Declaration.
- I agree that HL has not given me any advice regarding the transfer that I have requested and that I am undertaking the transfer on a non-advisory basis.
- I understand that I am responsible for my decision to transfer and that I should seek financial advice if I am unsure whether a transfer is the right course of action for me.

- I have read, agreed to and retained the Key (Investor) Information Document of my chosen investments (where available), and reviewed all costs and charges, provided to me at [www.hl.co.uk](http://www.hl.co.uk) or on paper.
- I agree to HL investing my transferred pension into the investment choices provided below. If I have not provided investment choices then I agree to my transferred pension being held as cash pending investment instructions.

Signature:

Date:

Hargreaves Lansdown Asset Management Ltd,  
One College Square South, Anchor Road, Bristol, BS1 5HL

### 2. Your investment choices

**PLEASE NOTE - UNLESS YOU PROVIDE INVESTMENT INSTRUCTIONS, YOUR TRANSFERRED PENSION WILL BE HELD AS CASH.**  
Please tell us where you would like this transfer invested.

If you're not sure what your scheme's default investment is, please contact our helpdesk on **0117 314 1795**

Your Investment Choice	Percentage
YOUR SCHEME'S DEFAULT INVESTMENT	%
	%
	%
<b>CASH - to be held pending investment instructions</b>	%
	<b>TOTAL 100%</b>

Any questions? Contact the Pensions Helpdesk

 0117 314 1795

 [invest@hl.co.uk](mailto:invest@hl.co.uk)