

SIPP TWO-MINUTE TRANSFER FORM

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.

Transfer options

• **Transfer your pension as cash** – your provider will sell your investments, then transfer the cash amount. You will not be invested during the transfer, so will not make gains or losses.

Once your transfer is complete you'll be able to buy investments. This type of transfer usually takes 2-4 weeks depending on your provider.

• **Transfer your pension investments** – all your investments and cash will be transferred.

You will be invested during the transfer, so you could make gains or losses. Usually you cannot trade until your transfer is complete.

This type of transfer usually takes 6-8 weeks, depending on your investments and provider. If you select this option we will convert any funds transferred to the lowest cost version we offer. We will never convert you into a fund that's more expensive than the one you already hold.

There are no charges or tax to pay. Before transferring please read about converting funds at www.hl.co.uk/convert.

We'll contact you to cover your options if your provider cannot transfer your pension investments or you hold an investment we do not offer.

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.

Policy 1 – transfer to the HL SIPP AWST2

Title (Mr, Mrs, etc):	First name(s):	Surname:	
Address:		Postcode:	Nationality:
Date of birth:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	National Insurance No. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Tick here if you have no NI No. <input type="checkbox"/>

Pension details

Transfer your pension as cash Transfer your pension investments

Pension name:	Policy number:	
Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £	<input type="checkbox"/> Tick if partial transfer
Pension type: e.g. Stakeholder	<input type="checkbox"/> Tick if this is a drawdown policy	
Name and address of administrator:	Postcode:	

I confirm

- I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.
- 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: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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Policy 2 – complete if you want to transfer another pension

Title (Mr, Mrs, etc):	First name(s):	Surname:	
Address:		Postcode:	Nationality:
Date of birth:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	National Insurance No. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Tick here if you have no NI No. <input type="checkbox"/>

Pension details

Transfer your pension as cash Transfer your pension investments

Pension name:	Policy number:	
Approx. value of funds in drawdown £	Approx. value of funds not in drawdown £	<input type="checkbox"/> Tick if partial transfer
Pension type: e.g. Stakeholder	<input type="checkbox"/> Tick if this is a drawdown policy	
Name and address of administrator:	Postcode:	

I confirm

- I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.
- 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: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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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**