

**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](http://www.hl.co.uk/sipp-transfer)
2. Select 'transfer your pension now'

Policy 1 – transfer to the HL SIPP

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></div><div></div></div>	Nationality:
<div><input type="checkbox"/> Transfer your pension as cash</div> <div><input type="checkbox"/> Transfer your pension investments</div>		

**Pension details**

Pension name:

Policy number:

Approx. value of funds £

☐ 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](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.

Please sign here



SIGNATURE

Date: 

D

D

M

M

Y

Y

2. Which investments would you like to choose?

You can choose to invest in the HL Ready-Made Pension Plan and/or other investments. If you leave this section blank, we'll leave your pension as cash.

**Choose the Ready-Made Pension Plan**

The Ready-Made Pension Plan is a simple, low-cost investment solution, exclusively available to SIPP clients. The plan is managed by experts and aims to grow your money when you're younger, then lower risk as you get closer to retirement. The plan is made up of two funds to help meet that objective.

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

Please note, the plan has not been designed to meet your individual needs or goals. 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](http://www.hl.co.uk/rmpp).

	Transfer (min. £100 per fund)	Lump sum (min. £100 per fund)	Monthly saving (min. £25 per investment)
HL Ready-Made Pension Plan	%	£	£
Add/Choose other investments (or cash) Full fund/share name	%	£	£
	%	£	£
	%	£	£
	%	£	£
If you'd like to choose more investments please let us know on a separate sheet.	Cash	%	£
	Total	100 %	£