

## 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:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	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: <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>
Account number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Payment reference: <input type="text"/>
Name and address of bank branch:	Postcode: <input type="text"/>

☐ **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 	SIGNATURE	Date: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name: <input type="text"/>	Position: <input type="text"/>	

### 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