

WORKPLACE PENSION TRANSFER FORM

HARGREAVES
LANSDOWN

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

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.

This type of transfer usually takes 2-4 weeks depending on your provider. If you don't provide investment choices on the second page of this form, the transferred amount will be invested in the default investment – HL Growth Fund.

- **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.

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**.

We'll write to you to let you know when your transfer completes.

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:	NI number:	Tick here if you have no NI number <input type="checkbox"/>
Your Employer:	Nationality:	

Details of the pension to transfer

<input type="checkbox"/> Transfer your pension as cash	<input type="checkbox"/> Transfer your pension investments	
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 or on paper.

- I understand my pension will be transferred as cash if I haven't selected one of the transfer options above.

- If my pension is transferred as cash and I have not provided investment choices on the second page of this form, then I agree to my transferred pension being invested in the default fund option – HL Growth Fund.

I confirm I have read the factsheet for this investment.

If you're reading a printed version of this form, scan the QR code to access the HL Growth Fund factsheet.



Signature:	X
Date:	X D D M M Y Y

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

TURN OVER TO CHOOSE YOUR INVESTMENTS

2. Your investment choices

PLEASE NOTE - If your pension is transferred as cash and you don't provide investment instructions, your transferred pension will be invested in the default fund option – HL Growth Fund.

Please tell us where you would like this transfer invested.

Your Investment Choice	Percentage
	%
	%
	%
	%
	%
	%
	%
	%
CASH - to be held pending investment instructions	%
	TOTAL 100%

Any questions? Contact the Pensions Helpdesk



0117 314 1795



invest@hl.co.uk