

RETIREMENT SERVICE

DRAWDOWN ILLUSTRATION REQUEST

HARGREAVES
LANSDOWN

Scheme/Member information

Full name of scheme:	<input type="text"/>
Full name including title:	<input type="text"/>
Date of birth:	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Address (including postcode):	<input type="text"/>
Member policy number:	<input type="text"/>
Member telephone number:	<input type="text"/>
Member e-mail address:	<input type="text"/>
Copy of member ID attached?:	Yes <input type="checkbox"/> No <input type="checkbox"/>

Pension Details

Policy type: (where occupational, please specify the type e.g. DC)	<input type="text"/>
Current fund value:	£ <input type="text"/>
Can this policy be transferred via Origo?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Please note, the HL SIPP cannot automatically accept transfers from the following schemes:

- AVCs linked to a Defined Benefit scheme (where the AVC can provide some or all of the main scheme tax-free cash entitlement)
- Money Purchase schemes or Section 32 plans with an underpin or containing GMP or 9(2B) Rights
- Cash Balance schemes

Please call us on 0117 314 1775 if the scheme falls into any of the above categories.

We will assume the following defaults unless you clearly state otherwise in the notes section

- The pension fund is uncrystallised. Please note we cannot accept crystallised funds unless the fund is already in drawdown or the member is over 75.
- A full fund transfer is permitted.
- There is no Court Order attached to the plan. Please note, we do not accept transfers of plans with Court Orders.
- Tax-free cash entitlement is 25% of the current value. If there is protected tax-free cash, please confirm the current entitlement in the Notes box.
- A nil income basis is required.

Notes:

Template completed by:

Date:

Once completed, password protect this form and email to Retirementservice@hl.co.uk
Please also issue a transfer pack and transfer forms to the member.