

CLSA

BULK TRANSFER FORM



HARGREAVES
LANDSOWN

Application to transfer your Aviva plan to your HL Workplace pension (the HL Group SIPP)

Before transferring you should read the HL SIPP Terms and Conditions, as well as the Key Features (including the Important Investment Notes, Transfer Checklist and Common Transfer Declaration).

It's important to compare the benefits and charges of both pensions before deciding whether to transfer.

Returning this form allows the transfer of the pension below to HL without further paperwork, when possible.

We'll write to you if there are additional forms to complete.

1. Transfer your Aviva pension to your HL Group SIPP

Title (Mr/ Mrs, etc):	Surname:	Full Forename(s):
Address:		Postcode:
Nationality:	Date of birth:	NI Number:

Details of the pension to transfer

Scheme Name:	Aviva MyMoney SIPP	Policy Number:
Type of scheme: (e.g. Stakeholder/FSAVC)	Group Personal Pension	Tick here if this is a partial transfer <input type="checkbox"/> Value if this is a partial transfer: £
Name and address of administrator:	Aviva, Pomona Business Centre, 6 Pear Street, Sheffield	Postcode: S11 8LR

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 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 agree to HL investing my transferred pension into the investment choices provided below. If I have not provided investment choices then I agree to my transferred pension being held as cash pending investment instructions.

Signature:

X

Date:

X

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

2. Your investment choices

PLEASE NOTE - UNLESS YOU PROVIDE INVESTMENT INSTRUCTIONS, YOUR TRANSFERRED PENSION WILL BE HELD AS CASH.

Please tell us where you would like this transfer invested.

Looking for investment ideas? Visit www.hl.co.uk

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

Any questions? Contact the Helpdesk



0117 314 1795



invest@hl.co.uk