



Part A Personal Information

@sipp Member Number

National Insurance Number

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Permanent Residential
Address

Mr/Mrs/Miss/Ms/Other		Surname			
Forename(s)					
Postcode		Date of Birth			

Marital Status

☐ Married ☐ Single ☐ Widowed ☐ Divorced ☐ Registered Civil Partner

☐ Employed

☐ Self-Employed – Trading as

☐ Pensioner

☐ Child under 16

☐ Other (please specify):

☐ Caring for one or more children under 16

☐ Caring for person aged 16 or over

☐ In full time education

☐ Unemployed

☐ Other (give details below)

Part B Contributions

Are you subject to the money purchase annual allowance rules?

☐ Yes ☐ No

Personal contributions are paid net of basic rate income tax. We claim back the tax relief from HM Revenue & Customs and add it to your fund. Please note that this can take up to eleven weeks. Any employer contributions must be paid gross.

Important: if you have protection against the lifetime allowance, any contributions made to this SIPP could mean you may lose this protection. You should speak to your financial adviser.

	Net Amount (of Basic Rate)	Start date for regular contributions
a) Personal		
Single	<input type="text" value="£"/>	<input type="text" value=""/>
Regular	<input type="text" value="£"/>	<input type="checkbox"/> Monthly <input type="checkbox"/> Annually

	Gross Amount (of Basic Rate)	Start date for regular contributions
b) Employer		
Single	<input type="text" value="£"/>	<input type="text" value=""/>
Regular	<input type="text" value="£"/>	<input type="checkbox"/> Monthly <input type="checkbox"/> Annually

For regular contributions, the employer should complete an @sipp Standing Order form and a Record of Payments Due form. (Any future amendment to the employer regular contribution will require a new Record of Payments Due form to be completed.)

Do you give authority to @sipp to correspond directly with the Employer?

☐ Yes ☐ No

Contribution Payment Details

Cheque Payment Details “@sipp (Pension Trustees) Ltd – [Member Surname + Member number]”

Bank Transfer Details

Account Name:	Barclays Corporate, Aurora, 1st Floor, 120 Bothwell St, Glasgow, G2 7JT
Sortcode:	Atsipp Pension Trustees Limited re SIPP Receipt Account
Account Number:	20-33-70
Sender's reference:	33833593
	[Member Surname + Member number]

Part C Employer's Details

Name of Employer

Nature of Business

Address

Postcode

Contact Name

Telephone Number

Employer's Contribution Agreement

I/We agree that I am/we are willing to pay @sipp (Pension Trustees) Ltd the amount(s) indicated in Part B (b).

Signature

Position

Date

Part D Investment Instructions

Please provide your investment instructions for the Contribution(s) stated in Part B.

Where no instruction is given, all money will be held in the SIPP bank account until we receive investment instructions from you.

Investment Provider	Policy Number	£ or %	Specific Fund Instructions

Part E Financial Adviser's Details

Please give details of your Financial Adviser.

Adviser's Name		
Company Name		
Address		
	Postcode	Email
	Tel No	Fax
FCA Number		

Fees

Is your Financial Adviser to be paid an initial fee for the contribution from your @sipp trustee bank account?

☐ Yes ☐ No If yes, please complete below.

	Amount	or	% of Initial Investment
Initial Fee	£		%

Where an annual fee is being paid, it will continue to be paid at review date.

Please note, if you are paying a percentage of initial investment to your Financial Adviser, this will be calculated on gross contributions amounts, where applicable.

Part F Member Declaration

- I declare that the total contributions to any registered pension schemes in respect of which I am entitled to relief under section 188 of the Finance Act 2004 will not exceed the higher of:
 - a) The basic amount, or
 - b) My UK relevant earnings within the meaning of section 189 of the Finance Act 2004 in any tax year.
- I declare, where my total gross contributions exceed the Annual Allowance in the current tax year, that I have sufficient unused annual allowances to carry forward from the three previous tax years.
- I declare that:
 - a) in relation to:
 - i) the particulars specified in Part A are to the best of my knowledge and belief, correct and complete and
 - ii) the second bulleted contributions declaration above is to the best of my knowledge and belief, correct.
 - b) no later than either the date which is 30 days after the occurrence of the event or 5th April in the tax year of assessment, I will give notice to you if an event occurs, as a result of which I am no longer entitled to tax relief for contributions pursuant to section 188 of the Finance Act 2004.
- I undertake to inform the @sipp Limited in writing (within 30 days) if:
 - a) I cease to be a UK resident
 - b) There is any change in my name or permanent residential status or employment status or
 - c) I contribute on aggregate more than 100% of my earnings to this and any other pension scheme in any tax year
 - d) I cease to have UK relevant earnings.

Signature

Date

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The information on this application is used in dealings with HM Revenue & Customs for tax relief purposes. It is a serious offence to make false statements with penalties being severe. False statements could lead to prosecution.

If you have applied for enhanced protection against the lifetime allowance, making a contribution could invalidate this protection.



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@sipp Limited is registered in Scotland (Registered No. SC217126) and has its registered office at 6th Floor, Mercantile Building, 53 Bothwell Street, Glasgow, G2 6TS and is authorised and regulated by the Financial Conduct Authority under Firm Reference No. 462907 and you can check this authorisation at www.fca.org.uk or by calling the FCA on 0800 111 6768.