

Pension Money SIPP

PERSONAL CONTRIBUTION FORM

You can use this form to advise us of a regular contribution to your SIPP.

Please note that without this contribution form there may be a delay in adding your contribution into your SIPP investment account and in claiming any tax relief due to you.

Member Name						
Scheme Number		NI No.				
REGULAR PERSONAL CONTRIBUTIONS						
Regular Contribution	£					
Regular contributions should be taken on the following basis: (please tick only one option)						
Monthly	Quarterly		Bi-annually		Annual	ly
Starting on		All regular contribu	tions will be tal	ken on the 1s	t of the month	n by direct debit

TAX ENTITLEMENT

Please read the below statements and select one option which is applicable to you. This will enable us to reclaim the relevant tax relief.

Option 1	Option 2	Option 3
• I have relevant UK earnings chargeable to income tax or general earnings from overseas crown employment subject to UK income tax in the current tax year and I am, or have been a resident in the UK at some time in the current tax year	 My spouse/civil partner have general earnings from overseas crown employment subject to UK tax for the current tax year. I, or my spouse/civil partner are in overseas crown employment but for this tax year do not have relevant UK earnings subject to UK income tax I was a resident when I became a member of the SIPP and have been a UK resident in the previous 5 years but do not have UK relevant earnings in the current tax year 	 I am not a UK resident and I have not been for the previous 5 years I am over the age of 75
We will claim basic rate tax relief (20%) on your whole contribution	We will claim tax relief up to a maximum of £3,600 gross (£2,880 net)	We will not claim any tax relief on your contribution.

The Pension Money SIPP is provided and operated by Hartley Pensions Limited, a company authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 09469576 T: 0117 316 9991 E: admin@hartleysas.co.uk W: www.hartleypensions.com

After the contribution has been processed I wish for the funds to;

Remain in my SIPP bank account				
Or, To be invested into				
The full gross amo	ount* or; Specif	fied amount	٤	
*original contribution amount plus tax relief from HMRC, please note that tax relief is not pre funded and can take approximately 8 weeks from the date of				

I confirm that the total gross contributions made to all UK registered pension schemes of which I am entitled to tax relief in any year will not exceed the higher of £3,600 gross or 100% of my UK relevant earnings.

contribution to be applied to your SIPP.

I will notify the Scheme Administrator if I am no longer entitled to tax relief on my contributions no later than the end of the tax year or within 30 days from the date of change.

I confirm that the information provided on this form is correct and should a tax liability arise due to tax relief being incorrectly claimed by the scheme based on this information, this liability will be met by me and not by the scheme, or Hartley Pensions Limited or the Trustee.

It is a serious offence to make false statements and doing so could lead to prosecution.

Signature

Date

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HARTLEY PENSIONS Trustees limited

INSTRUCTIONS TO YOUR BANK OR Building Society to pay by direct debit

Please fill in the whole form using a ball point pen and send to:						
Hartley Pensions Ltd 5th Floor 25 Marsh Street Bristol BS1 4AQ	Service user number					
Name(s) of Account Holder(s)	Reference					
Bank/building society account number						
	Instruction to your bank or building society Please pay Hartley Pensions Trustees Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by					
Branch sort code	the Direct Debit Guarantee. I understand that this instruction may remain with Hartley Pensions Trustees Limited and, if so, details will be passed electronically to my bank/building society.					
Name and full postal address of your Bank or Building Society						
To the manager of: Bank/Building Society	Signature(s):					
Address:						

Date:

Banks and Building Societies may not accept Direct Debit instrutions for some types of account.

This guarantee should be detached and retained by the payer

THE DIRECT DEBIT GUARANTEE

DIRECT

- This guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Hartley Pensions Trustees Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request Hartley Pensions Trustees Limited to collect a payment, confirmation of the amount and date will be given out to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Hartley Pensions Trustees Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society if you receive a refund you are not entitled to, you must pay it back when Hartley Pensions Trustees Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.