

Pension Money SIPP

THIRD PARTY 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.

THIRD PARTY CONTRIBUTIONS

Regular Contribution £

Regular contributions should be taken on the following basis: (please tick only one option)

Monthly Quarterly Bi-annually Annually

Starting on All regular contributions will be taken on the 1st of the month by direct debit

Contributor Name

Contributor Address

Postcode Date of Birth

Contributor NI No

Contributor Driving licence/passport No

Relationship to Member

Due diligence checks will be completed on the contributor before the contribution is processed



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
<ul style="list-style-type: none">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	<ul style="list-style-type: none">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 taxI 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	<ul style="list-style-type: none">I am not a UK resident and I have not been for the previous 5 yearsI am over the age of 75
<input type="checkbox"/> We will claim basic rate tax relief (20%) on your whole contribution	<input type="checkbox"/> We will claim tax relief up to a maximum of £3,600 gross (£2,880 net)	<input type="checkbox"/> We will not claim any tax relief on your contribution.

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 amount* or; Specified amount

£

*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 contribution to be applied to your SIPP.

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.

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.

Signed
(SIPP Member)

Date

