InvestAcc Platinum

Self-Invested Personal Pension

Platinum SIPP

Supplementary Contribution Application Form

To add or alter contributions to an existing SIPP

www.investaccplatinum.co.uk

Supplementary Contribution Application Form

Whenever you, your employer or a third party wish to make contributions to your SIPP, we need you to supply the information in this form.

Note that if your employer is paying or forwarding regular contributions to your SIPP, your employer will also need to complete part of this form.

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If you have any questions about the completion of this form, please contact the Platinum SIPP team on 0345 25 05 609 or email platinumsipp@investacc.co.uk

Sending us your completed application

The completed and signed application can be sent to us by post or by email. Our postal address is:

InvestAcc Platinum
5th Floor, 4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Our email address is platinumsipp@investacc.co.uk

Emailed applications must be high quality scans (not photographs).

Digital signatures or electronic signatures

You may be able to complete this form and sign it without the need to print it out, if you have the free Adobe Acrobat Reader with the 'fill and sign' option, which allows you to add a signature. Note that this must clearly be your actual signature, not a handwriting font or similar. We reserve the right to refuse applications or to ask for evidence of signature, such as that which appears on a driving license or passport, or to obtain a traditional wet signature.

We may also accept applications signed using DocuSign or Adobe Sign, but only where an FCA regulated financial advice firm has one of these systems and provides the completed documents, accompanied by the DocuSign Certificate of Completion or Adobe Final Audit Report.

Section A - Personal details

Title	Forename(s)
Surname	
SIPP member number (if known)	National insurance number
Mobile phone number	
Email address	
Permanent residential address	
	Postcode

Are you currently UK resident?

◯ Yes ◯ No

If **'No'**, have you been UK resident at any time in the current or previous five tax years?

◯ Yes ◯ No

Section B - Contributions

If regular contribution payments are to be made to your SIPP, please arrange a regular payment with your bank.
Please always quote your SIPP number as the payment reference. Note that we do not offer a Direct Debit facility.

For Platinum SIPP schemes, payments should be made direct to your individual designated SIPP bank account (the unique account details should have been advised to you).

Where applicable, InvestAcc will reclaim tax relief at the relevant rate on personal contributions made before you reach age 75. Please note that the value of the tax reclaimed can only be invested once it has been received in your designated SIPP bank account. You can see details of how long it takes to get the tax relief here: www.investaccplatinum.co.uk/tax-relief-calendar.
If you are eligible for additional tax relief, for example at the higher rate, you must reclaim the extra amount yourself through your self-assessment tax return or by contacting HMRC directly.

Single contributions:

Employer single contribution (insert **gross** amount) £

Personal single contribution (insert **net** amount) £

If you or your employer are making a single contribution, please indicate the payment method:

Employer contribution ◯ Bank transfer ◯ Cheque

Personal contribution ◯ Bank transfer ◯ Cheque

Regular contributions:

Employer (insert **gross** amount)

£	Start Date	End Date	Frequency: ◯ Monthly ◯ Quarterly ◯ Yearly

Employer (insert **net** amount)

£	Start Date	End Date	Frequency: ◯ Monthly ◯ Quarterly ◯ Yearly

Will your personal contributions be paid by a third party, other than your employer?

◯ Yes ◯ No

If 'Yes', please provide the name and address of the third party:

Title	Forename(s)
Surname	
Third party organisation name (if applicable)	
Third party address	
	Third party date of birth (DD/MM/YYYY)

Please send us documentary evidence of the identity and address of the third party.

If you or your employer are making regular contributions, are they to increase with your salary?

◯ Yes ◯ No

Is your employer deducting contributions from your salary and paying them to your SIPP, on your behalf?

◯ Yes ◯ No

Are these contributions being paid to your SIPP as a result of you opting out of your employer's workplace pension scheme?

◯ Yes ◯ No

Employer declaration

(To be completed if your employer is making contribution payments or deducting them from your salary and paying them to your SIPP).

The employer agrees to pay the above contributions until further notice, or until the end date where applicable, and will notify InvestAcc of any change and provide a new employer contributions form.

The employer has a duty to pay employee contributions to InvestAcc by the 'payment due date'. This is the 19th of the month following the date of the deduction from pay. For example, a contribution deducted from pay on 8th June must be received by us no later than 19th July. InvestAcc has a duty to report the late payment of any contribution that is of material significance to The Pensions Regulator.

Employers are obliged by The Pensions Regulator to provide a new employer declaration, for any amendments to contributions.

I am an authorised signatory for the employer noted below. I agree with the above statements and confirm the contribution details on this form are correct.

Name of employer or trading name		
1st line of employer address		
2nd line of employer address		
City	County	Postcode
Business telephone number		

Signature for and on behalf of employer	Print name	DD/MM/YYYY

Section C - Investment instructions

Please provide instructions about the investments you would like to make with these contributions:

Type	Tick if 'Yes'	Firm / Product Name	Amount £	Application Forms
Designated SIPP Bank Account	See note below			See note below
External Bank Account	○			○ Enclosed
Discretionary Investment Manager (DIM or DFM)	○			○ Enclosed
General Investment Account	○			○ Enclosed
Trustee Investment Plan	○			○ Enclosed
Share Dealing Account	○			○ Enclosed
Commercial Property / Land*	○			○ Enclosed
Structured Product	○			○ Enclosed
Gold Bullion	○			○ Enclosed
Other	○			○ Enclosed

**If you are investing in Commercial Property / Land please complete a Platinum SIPP Property and Land Questionnaire for each investment.*

If you are paying personal contributions to your SIPP, do these instructions cover the tax relief too?

○ Yes ○ No (if 'no', the tax relief will remain in the designated SIPP bank account until otherwise instructed).

IMPORTANT NOTE

You must send us applications for any of the investments above, except for the designated Bank Account which we will automatically open with our preferred bankers. All cash will be held in the designated Bank Account until we receive your investment instructions and completed investment applications. If you require further space, please attach a separate sheet.

We may need to contact you to confirm the investment amount(s) as the value of funds being transferred to your SIPP can fluctuate and may be insufficient to cover the amounts noted above.

Section D - Adviser fee agreement

You should only complete this section if you have not already informed us of the amount of any adviser fees that you authorise us to pay your adviser from your SIPP funds for this new contribution.

Initial adviser fees

I instruct InvestAcc to pay the following fees to my financial adviser's firm, from my SIPP funds. I understand that this fee applies solely in respect of the advice given to me for this contribution.

Advice relating to this contribution £ Fixed fee (for single or regular or contributions) **OR** % of gross contribution (for single contribution)

Should VAT be added to the fees above?

○ Yes ○ No

On-going adviser fees

Any on-going fees will be paid at the level already agreed between me and my adviser. If the on-going fees I have already agreed are a percentage of my plan value, I understand that this contribution will increase the plan value, which will in turn increase the amount of any on-going fees paid to my adviser from my SIPP funds.

Section E - Personal declaration

a) I confirm that to the best of my knowledge and belief, the particulars given on this application form are correct and complete.

b) I undertake to tell InvestAcc Pension Administration Limited (InvestAcc) in writing within 30 working days if:
- There is any change in my residency status.
- There is any change in my name or permanent residential address.

c) Where contributions are to be paid into my SIPP, I confirm I am under age 75 and I am a relevant UK individual.
An individual is a relevant UK individual for a tax year if:
- The individual has **relevant UK earnings** chargeable to income tax for that tax year, or
- The individual is resident in the United Kingdom at some time during that tax year, or
- The individual was resident in the UK at some time during the five tax years immediately before the tax year in question and was also resident in the UK when they joined the pension scheme, or
- The individual has for that tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of the Income Tax (Earnings and Pensions) Act 2003), or
- The individual is the spouse or civil partner of an individual who has for the tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of the Income Tax (Earnings and Pensions) Act 2003.

For relevant UK individuals who do not have relevant UK earnings, the maximum contribution is the 'basic amount' (currently £3,600). Relevant UK earnings means:
- Employment income such as salary, wages, bonus, overtime, commission providing it is chargeable to tax under Section 7(2) ITEPA 2003.
- Income chargeable under Part 2 ITTOIA 2005, that is income derived from the carrying on or exercise of a trade, profession or vocation (whether individually or as a partner acting personally in a partnership).
- Income arising from patent rights and treated as earned income under section 833 (5B) ICTA 1988.
- General earnings from an overseas Crown employment which are subject to tax in accordance with section 28 of ITEPA 2003.

Where relevant UK earnings are not taxable in the United Kingdom due to section 788 of ICTA 1988 (double taxation agreements), those earnings are not regarded as chargeable to income tax and so will not count towards the annual limit for relief.

d) I understand that this application determines whether my contributions are eligible for tax relief at source at the relevant rate.

e) I agree that the total contributions to any registered pension scheme in respect of which I am entitled to tax relief will not exceed the higher of:
- £3,600, or
- My relevant UK earnings for that tax year.

f) If I am no longer entitled to tax relief on my contributions, I will undertake to tell InvestAcc in writing no later than:
   - 5 April in the year of assessment in which this occurs, or
   - Within 30 days of this change.

g) I understand it is an offence to make false statements and that the penalties are severe and could lead to prosecution.

h) I understand that contributions and any tax relief claimed upon them by InvestAcc, will be held in the designated SIPP bank account unless InvestAcc has been provided with written investment instructions from me or my financial adviser.

i) I understand that these contributions may be held in a non-interest bearing pooled trustee account for expediency, where InvestAcc is aware of an impending investment transaction or benefit payment.

j) I confirm that I have not been convicted of an offence involving dishonesty or deception. I am not an undischarged bankrupt. I have not made an arrangement with creditors which remains undischarged. I am not disqualified as a company director.

k) I confirm that InvestAcc may correspond with my employer or third party, where I have indicated that contributions are being made by them.

Member signature	Date

SIPP cancellation rights - contributions paid within 30 days of establishing your SIPP

When you first establish your SIPP, we will offer you the right to cancel within 30 calendar days. Within this period, we will invest your funds in accordance with your instructions; however, should you exercise your right to cancel then you may not get back the full amount invested. Note that we will not allow you to withdraw funds from your SIPP or make an investment in commercial property or land using these funds during the cancellation period unless you waive your right to cancel. Note that you cannot cancel your SIPP or any contributions made to it, after the 30-day period from when your SIPP commenced.

If your SIPP has been established for less than 30 days and you wish to waive your right to cancel and take your benefits and/or make commercial property or land investments immediately you can complete the following waiver:

My SIPP has been established for less than 30 days and I would like to waive my right to cancel. I fully understand the implications of this, including the fact that once I have waived my right to this cancellation period, I will no longer be able to have any contributions detailed in this form refunded.

Member signature	Date

All our SIPP products are offered without advice of any kind.
A SIPP may not be suitable for all investors. If in doubt you should consult a suitably authorised financial adviser.

InvestAcc Pension Administration Limited is the operator and scheme administrator and is responsible for the maintenance and running of the scheme.

The levels of and bases of taxation can change. The value to an investor of any tax benefits will depend on that investor's tax position.
Investors should consult their own tax advisers regarding any applicable tax consequence.

InvestAcc Pension Administration Limited is authorised and regulated by the Financial Conduct Authority.
InvestAcc Pension Administration Limited is registered in England and Wales, Company number 7118349.

InvestAcc Platinum

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