Fidelity INTERNATIONAL

Personal Investing

The Fidelity SIPP

Cash top up form for third parties making additional cash contributions to your SIPP

Use this form to:

- allow a third party to make a single cash contribution to your Fidelity SIPP.

Don't use this form if:

- you haven't yet opened your Fidelity SIPP
- either you or your employer are making contributions to your Fidelity SIPP
- you want to set up or amend a Regular Savings Plan you already have on your Fidelity SIPP.

Before you fill in this form:

- make sure you read the important documents shown in the box to the right.

How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this: ☒
- if you make a mistake, please correct it but don't use correction fluid.

Checklist

☐ Check that you have answered all the relevant questions.

☐ If your top up is being made by cheque, please attach a cheque from the third party as per section 3.

☐ Please ensure that this cheque payment is separate to other payments that are made to us. Building Society and Bank Draft payments must bear a reference to confirm that this is the spouse/civil partner or any other third party's money. Please ensure their name is clearly added by the issuing bank only, on the face of the cheque.

☐ Read and sign the Declaration in section 5.

What's next?

Please send your completed form to:

Fidelity
PO Box 391
Tadworth
KT20 9FU

We will write to confirm when we have invested the additional contributions.

Further information on fidelity.co.uk

You should read the Key Features Document before completing this form – this summarises everything that you need to know about the Fidelity SIPP. You will find it at **fidelity.co.uk/sippinfo**

Want to talk to us?
Freephone **0800 358 7480**

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1 About you

1.1 Your details

1.1.1 Title

☐ Mr ☐ Mrs ☐ Ms ☐ Other:

1.1.2 Surname

1.1.3 First and other names in full

1.1.4 Date of birth (DDMMYYYY) **Town of birth**

1.1.5 Country of birth

1.1.6 Employment status

☐ Employed ☐ Self-employed ☐ Unemployed ☐ Full-time education

☐ Pensioner ☐ Caring for children under 16 ☐ Other – please specify below.

1.1.7 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

☐ No ☐ Yes –

1.1.8 Are you a UK National only? (Please mark an X in the box) ☐

1.1.9 Are you a UK National and National of one or more other countries? ☐
(Please mark an X in the box and list all other countries below)

1.1.10 Are you a National of Non-UK countries only? ☐
(Please mark an X in the box and list all other countries below)

Nationality 1 **Nationality 2**

Nationality 3 **Nationality 4**

1.1.11 Driving Licence number (if applicable – 18 characters as shown on your photocard)

1.1.12 Phone numbers

Home

Mobile

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For office use only

☐ PEN

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1 About you (continued)

1.1.13 Email

1.1.14 Your address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

1.1.15 What is your Fidelity SIPP account number?

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2 About the spouse/civil partner or other third party

2.1 Their details

2.1.1 Title

☐ Mr ☐ Mrs ☐ Ms ☐ Other:

2.1.2 Surname

2.1.3 First and other names in full

2.1.4 Date of birth (DDMMYYYY) **Town of birth**

2.1.5 Country of birth

2.1.6 Employment status

☐ Employed ☐ Self-employed ☐ Unemployed ☐ Full-time education

☐ Pensioner ☐ Caring for children under 16 ☐ Other – please specify below.

2.1.7 Driving Licence number (if applicable – 18 characters as shown on your photocard)

2.1.8 Their address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

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3 Spouse/civil partner or other third party contributions

3.1 Their contributions

Due to regulatory requirements we must obtain information about the source of their contributions before we can accept your application.

3.1.1 Source of this investment

☐ Income from salary ☐ Divorce Settlement ☐ Sale of Property ☐ Inheritance

☐ Gift ☐ Sale of Investment/transfer ☐ Savings from income

☐ Other – please specify: ________________________

3.2 Their single contributions

3.2.1 How much does your spouse/civil partner or other third party want to contribute?

£ ______ • __

3.2.2 How can they make a payment?

Cheque/banker's draft – must be made payable to Fidelity and include the account holder's name. E.G. "Fidelity re: account holder's name". Cheques must be issued from a personal or a joint bank account in their name. Payments from other parties are not permitted. In addition, for banker's drafts and building society cheques, the reverse of the draft/cheque must contain the details of the original account debited including the full name, account number and sort code and must be endorsed with the bank's official stamp.

OR

☐ **Bank transfer** – please use the following details:

Bank: **BARCLAYS BANK PLC**
Account name: **FIL SIPP TRUSTEE (UK) LIMITED DEPOSIT TRUSTEE ACCOUNT**
Account number: **33039005**
Sort code: **20-93-32**

Reference: IMPORTANT: Please ensure you provide your **SIPP ACCOUNT NUMBER**, or your **NATIONAL INSURANCE NUMBER,** as the 'payment reference' when submitting your payment electronically.

This form must be received within five working days of the payment, otherwise monies will be returned to the payer's bank account. Please DO NOT use the bank details above to send a payment without completing and returning a form.

4 Your investment choices

4.1 About investing the contributions

The contribution will be paid into cash. Once the cash is available within your account you can then use our online service at **fidelity.co.uk** to select your investments. Our website includes a range of easy options to help you choose which investments to put into your SIPP.

Cash within my account	Single contribution
	1 0 0 %

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5 Your application summary

5.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I have been provided with and read:
  - the latest version of the Key Features Document – Doing Business with Fidelity incorporating the Fidelity Client Terms
  - the key information documents relevant to the chosen fund(s)
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- If contributions are to be paid:
  a) I am under age 75 and a relevant UK individual under Section 189 of Finance Act 2004 and not a US person
  b) The total of the member contributions paid to my Fidelity SIPP and to other registered pension schemes, on which I am entitled to tax relief, under Section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
    - The basic amount (currently £3,600 gross); or
    - 100% of my relevant UK earnings (as defined in Section 189 of Finance Act 2004 in the tax year);
  c) the declaration in b) is correct, to the best of my knowledge and belief;
  d) I will give notice to the Scheme Administrator if an event occurs, as a result of which I will no longer be entitled to relief on my contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
    - end of the tax year in which the event occurs; and
    - 30 days of the event
- I confirm that I have not received advice from Fidelity in connection with this SIPP top-up.

Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

Signature

Date signed

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6 Your application summary – third party

Please complete this section only if a third party is making a contribution.

6.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I have been provided with and read:
  - the latest version of the Key Features Document – Doing Business with Fidelity incorporating the Fidelity Client Terms
  - the key information documents relevant to the chosen fund(s)
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- I confirm that I have not received advice from Fidelity in connection with this SIPP top-up.

Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

Signature

Date signed

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