

The Fidelity SIPP

Regular Savings Plan amendment form for changing regular contributions to a Fidelity Junior SIPP.

Use this form to:

- change the amount being paid into a Fidelity Junior SIPP
- change the fund selection for future regular contributions
- change the bank account from which payments are taken
- change the date on which payments are taken from the bank account.

Don't use this form if:

- you want to make any other changes to the Fidelity Junior 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.
- Remember to complete and sign the Direct Debit Instruction in section 4.
- Read and sign the Declaration in section(s) 6 and 7.

What's next?



Remove the Direct Debit Guarantee, then send your completed form to:

Fidelity
PO Box 391
Tadworth
KT20 9FU

We will write to confirm when we have made changes to the Regular Savings Plan.



Further information on fidelity.co.uk

You should read these documents before completing this form. You will find them at fidelity.co.uk/sippinfo

- Key Features Document – this summarises everything you need to know about the Fidelity Junior SIPP.
- When choosing funds make sure you read the key information documents or product summary which sets out key information about the fund including the objectives and risks, what it invests in and its charges.

Want to talk to us?

Freephone **0800 358 7480**

2 About the legal guardian of the Applicant

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

2.1.9 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)

2.1.10 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

2.1.11 Phone numbers

Home

Mobile

2.1.12 Email

3 About the third party making a payment

Please only complete this section if a third party is paying

3.1.1 Title

Mr Mrs Ms Other:

3.1.2 Surname

3.1.3 First and other names in full

3.1.4 Date of birth (DDMMYYYY)

Town of birth

3.1.5 Country of birth

3.1.6 Employment status

Employed Self-employed Unemployed Full-time education
 Pensioner Caring for children under 16 Other - please specify below.

3.1.7 Driving Licence number (if applicable - 18 characters as shown on your photocard)

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

House number/name

Street, city, county and country

Postcode

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FILSIPPJunRSPAmIntP

Please complete the Direct Debit form below. We will then set up the regular contribution.



Instruction to your bank or building society to pay by Direct Debit



Please fill in the whole form using a ballpoint pen and send to: Fidelity, PO Box 391, Tadworth, KT20 9FU.

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Service User Number

4	4	9	7	0	6
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Reference

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Name(s) of account holder(s)

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Instruction to your bank or building society

Please pay FIL SIPP Trustee (UK) Limited. Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with FIL SIPP Trustee (UK) Limited and, if so, details will be passed electronically to my bank/building society.

Bank/building society account number

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Branch sort code

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Signature(s)
Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

DD12

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5 Investment choices – to be completed by the guardian

5.1 About investing the contributions

Once we hold the money in cash, we will follow the investment instructions below. If you want to invest in exchange-traded investments (ETIs), you can do this online once the money is in the account.

Need help choosing investments? We offer a wide range of investment options for personal pensions. If you don't know where to start and need some support, there's Retirement Builder - a single fund idea for pensions. Information about Retirement Builder is available alongside this form. All our investment options are available to view on our website: fidelity.co.uk/sipp-investments. The investment choices below will also be used to invest any existing regular contributions made into this account.

IMPORTANT: Please ensure you include the **fund code** as the fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at fidelity.co.uk

Should any of the new funds pay income, then income payments will be automatically reinvested on the account.

Fund code	Fund name	Regular contribution
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
Amount to be paid into cash within my account		<input type="text"/> %
Totals should add up to 100%		<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %

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6 Application summary

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 am the legal guardian of the Applicant; and the Applicant is under 18 years of age.
- 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 or product summary 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 I have selected Retirement Builder as the investment choice - I understand that the fund that Retirement Builder currently invests in may be swapped for an alternative fund following periodic reviews. If this happens, I agree to the investment being automatically switched into the replacement fund. Fidelity will inform me once this has been done.
- I confirm that I have not received advice from Fidelity in connection with this Regular Savings Plan amendment.

Signature of legal guardian of the Applicant

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

Signature

	
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Date signed

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7 Your application summary (third party)

7.1 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 or product summary 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 Regular Savings Plan amendment.

Signature of third party

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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Important: A Direct Debit Guarantee should be retained by the relevant payer.

The Direct Debit Guarantee



- 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, FIL SIPP Trustee (UK) Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request FIL SIPP Trustee (UK) Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by FIL SIPP Trustee (UK) 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 FIL SIPP Trustee (UK) 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.