

# THE HUBWISE HARTLEY SIPP

## APPLICATION FORM

Title Mr  Mrs  Ms  Dr  Surname

Forenames

Address

Postcode  Number of years at current address

If fewer than 3 years please give previous address:

Address

Postcode

Home Telephone  Mobile

Email Address

Date of Birth  National Insurance No.

Retirement Age

If you intend to immediately take benefits please tick

**Marital Status** (Please tick as appropriate)

Single  Married/Civil Partnership  Widowed  Divorced  Spouse's D.O.B

**Employment Status** (Please tick as appropriate)

Employed  Self Employed  Unemployed  Retired

Caring for a person aged 16 or over  Full Timed Education  Caring for a child under 16  Other

The Key Features document contains important information regarding how the Hubwise Hartley SIPP works, its structure and the rules that apply to membership of the Scheme. This should be read prior to signing the application and if there is anything that you do not understand you should ask your adviser. The Trust Deed and Rules are available on request.



**Please return completed form to:**

Hartley Pensions Ltd, 5th Floor, 25 Marsh Street, Bristol, BS1 4AQ. 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

## HMRC PROTECTION

If you have HMRC Protection and make a contribution in to your plan, the Protection may be lost which could result in a tax liability. It is recommended that you take advice from an Independent Financial Adviser.

Have you registered for HMRC Protection? Yes  No

Where you have registered for HMRC Protection, please advise what type and attach a copy of the certificate.

Type of Protection

Certificate Attached?

Yes  No

## ADVISER DETAILS

I hereby appoint (please insert name of adviser.)

As my financial advisers to act as a full servicing agent on my SIPP to advise on all activities such as transfer, investment and retirement requests.

## FEES

Initial Payment  £  or  % of initial contribution/transfer value

Ongoing Payment  £  or  % of fund value, payable

I agree for Hartley Pensions Ltd to settle these fees and any third party costs/fees relating to those investments or advice I receive in respect of this arrangement from my pension funds upon receipt of appropriate invoices.

If there are insufficient pension funds to settle any fees from my plan I agree to make alternative arrangements for settlement.

Hartley is also authorised to seek information from any third party necessary to establish this arrangement, and may realise any of the investments held for my benefit in order to pay such charges and any third party costs/fees relating to those investments or advice I receive in respect of this arrangement.

In return for the services to be provided by Hartley Pensions Ltd (Hartley), I agree that Hartley may deduct from my pension fund their charges, initial and ongoing, as outlined in the schedule of fees.

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## SOURCE OF FUNDS

- |   |   |
|---|---|
| <input type="checkbox"/> Transfers from existing products       | <input type="checkbox"/> Property Sale                |
| <input type="checkbox"/> Income from Employment                 | <input type="checkbox"/> Sale of Investments          |
| <input type="checkbox"/> Income from Savings and/or Investments | <input type="checkbox"/> Lottery / Gambling win       |
| <input type="checkbox"/> Savings                                | <input type="checkbox"/> Divorce Settlement           |
| <input type="checkbox"/> Gift or Inheritance                    | <input type="checkbox"/> Other (please specify below) |

- I have triggered my Money Purchase Annual Allowance (MPAA) with another pension arrangement.

## 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"><li>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</li></ul>	<ul style="list-style-type: none"><li>My spouse/civil partner have general earnings from overseas crown employment subject to UK tax for the current tax year.</li><li>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</li><li>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</li></ul>	<ul style="list-style-type: none"><li>I am not a UK resident and I have not been for the previous 5 years</li><li>I am over the age of 75</li></ul>
<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.

## DECLARATION

I instruct Hartley Pensions to invest all funds received to be invested onto the Hubwise Platform.

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 of from the date of change.

I have read the leaflet "Key Features Of the Hubwise Hartley SIPP" and have been notified of the charges involved in setting up and administering my plan. I hereby apply to Hartley Pensions Ltd to become a member of the Hubwise Hartley SIPP and agree to be bound by the scheme's Trust Deed and Rules.

I confirm that, to the best of my knowledge, the information provided on this Application Form and the accompanying forms are correct.

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

Signed

Date

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