



THE HARTLEY PENSION SCHEME

JUNIOR SIPP CONTRIBUTION FORM

Member Name

Scheme Number NI No.

PERSONAL CONTRIBUTIONS

| | | | |
|--------------------------|----------------------|----------------------------|----------------------|
| Single Net Contribution | <input type="text"/> | Single Gross Contribution | <input type="text"/> |
| Regular Net Contribution | <input type="text"/> | Regular Gross Contribution | <input type="text"/> |

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 Payable by Direct Debit

THIRD PARTY CONTRIBUTIONS

| | | | |
|--------------------------|----------------------|----------------------------|----------------------|
| Single Net Contribution | <input type="text"/> | Single Gross Contribution | <input type="text"/> |
| Regular Net Contribution | <input type="text"/> | Regular Gross Contribution | <input type="text"/> |

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 Payable by Direct Debit

Contributor Name

Contributor Address

Post Code Date of Birth

Relationship to Member

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 094695576. T:0117 316 9991 E: admin@hartleysas.co.uk W: www.hartleypensions.com



If payment is being made by cheque please make cheque payable to The Hartley Pension Scheme re (Your name)'

- I confirm I have sufficient carry forward provision to make the above quoted contribution.
- I confirm that the information I have provided in my application form is still relevant. (If your Tax status has changed then please complete the Tax Entitlement Declaration and return it with this form).

Important Note

If this is the first contribution made into your Hartley Pension Scheme please also complete the attached Tax Entitlement Declaration form. Where regular contributions are being set up please also complete a Direct Debit Mandate and return it with this form.

Signature

Date

TAX ENTITLEMENT

If you intend to make contributions in the future you will need to complete this section in order that Hartley can claim the correct tax relief. Please read the statement below and select the one that applies to you to enable us to establish whether you are eligible for tax relief or whether any limits apply:

- 1 I have relevant UK earnings chargeable to Income Tax or general earnings from Overseas Crown Employment subject to UK tax in this year;
- 2 I have, or will have been a resident in the UK at some point during this tax year;
- 3 My Spouse/Civil Partner, has general earnings from Overseas Crown Employment subject to UK tax for this year;
- 4 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 Tax;
- 5 None of the above;

1 or 2 Hartley will reclaim basic rate tax on your personal contributions.

3 or 4 Hartley will reclaim basic rate tax on personal contributions up to £3,600 (Gross).

5 Hartley will not reclaim any tax relief on personal contributions.

DECLARATION

- 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 confirm that, to the best of my knowledge, the information provided on this Contribution Form is correct.

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

Signed

Date

Please return completed form to:

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