



THE HARTLEY PENSION SCHEME

CONTRIBUTION FORM

Member Name

Scheme Number

NI No.

PERSONAL CONTRIBUTIONS

Single Contribution

£

Regular Contribution

£

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

EMPLOYER CONTRIBUTIONS

Regular Contribution

£

Single Contribution

£

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

Due diligence checks will be completed on the Employer/Contributor before the contribution is processed.

Please see Contribution Guidance notes for more details

Employer Name

Employer Address

Post Code

Company No.

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



THIRD PARTY CONTRIBUTIONS

Single Contribution	£	Regular Contribution	£
Contributor Name			
Contributor Address			
Post Code		Date of Birth	
Relationship to Member			
Contributor NI Number			
Contributor Driving License/Passport No.			

INVESTMENT DETAILS

After the contribution has been processed I wish for the funds to;

Remain in my SIPP bank account

Or, to be invested into
(insert current investment)

The full gross amount* or; Specified amount £

*original contribution amount plus tax relief from HMRC, please note that tax relief is not pre funded and can take approximately 8 weeks from the date of contribution to be applied to your SIPP.

Important Note

I understand Hartley Pensions may use a third party to correspond directly with my employer

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).

Signature

Date

Please return completed form to:

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TAX ENTITLEMENT DECLARATION

Member Name

Scheme Number

NI No.

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

TAX ENTITLEMENT

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 does 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 any contributions no later than the end of the tax year or within 30 days of the date of change.

I confirm that, to the best of my knowledge, the information provided on this Contribution Form and any accompanying forms are 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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