



THE HARTLEY PENSION SCHEME

EMPLOYER CONTRIBUTION FORM

You can use this form to advise us of a regular contribution to your SIPP.

Please note that without this contribution form there may be a delay in adding your contribution into your SIPP investment account.

Member Name

Scheme Number

NI No.

EMPLOYER CONTRIBUTIONS

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 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

Postcode

Company No.



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

Remain in my SIPP bank account

Or, To be invested into

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.

SIPP Member Signature

Date

Important Note

Where regular contributions are being set up please also complete a Direct Debit Mandate and return it with this form. 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.



HARTLEY PENSIONS
TRUSTEES LIMITED

INSTRUCTIONS TO YOUR BANK OR
BUILDING SOCIETY TO PAY BY DIRECT DEBIT

Please fill in the whole form using a ball point pen and send to:

Hartley Pensions Ltd 5th Floor 25 Marsh Street Bristol BS1 4AQ
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Service user number

1	6	6	2	6	6
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Name(s) of Account Holder(s)

Reference

Bank/building society account number

Branch sort code

Instruction to your bank or building society

Please pay Hartley Pensions Trustees 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 Hartley Pensions Trustees Limited and, if so, details will be passed electronically to my bank/building society.

Name and full postal address of your Bank or Building Society

To the manager of:	Bank/Building Society
Address:	

Signature(s):

Date:

Banks and Building Societies may not accept Direct Debit instructions for some types of account.

This guarantee should be detached and retained by the 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, Hartley Pensions Trustees Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request Hartley Pensions Trustees Limited to collect a payment, confirmation of the amount and date will be given out to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Hartley Pensions Trustees 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 Hartley Pensions Trustees 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.

