

THE HARTLEY PENSION SCHEME

PERSONAL 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 and in claiming any tax relief due to you. Member Name Scheme Number NI No. REGULAR PERSONAL CONTRIBUTIONS **Regular Contribution** £ Regular contributions should be taken on the following basis: (please tick only one option) Monthly Quarterly Bi-annually Annually All regular contributions will be taken on the 1st of the month by direct debit Starting on

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 • I have relevant UK earnings chargeable • My spouse/civil partner have • I am not a UK resident and I have to income tax or general earnings general earnings from overseas not been for the previous 5 years from overseas crown employment crown employment subject to UK tax subject to UK income tax in the for the current tax year. • I am over the age of 75 current tax year and I am, or have been a resident in the UK at some • I, or my spouse/civil partner are in overseas crown employment but for time in the current tax year this tax year do not have relevant UK earnings subject to UK income tax • 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 We will claim basic rate tax relief We will claim tax relief up to a We will not claim any tax relief (20%) on your whole contribution maximum of £3,600 gross (£2,880 net) on your contribution.

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



After the contribution has been processed I wish for the funds to;						
Remain in my S	SIPP bank account					
Or, To be invested into						
The full gross a	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.						
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 from the date of change.						
	formation provided on this form is correct and sho based on this information, this liability will be met or the Trustee.					
It is a serious offence to make false statements and doing so could lead to prosecution.						
Signature			Date			





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	Service user number				
BST 4AQ	1 6 6 2 6 6				
Name(s) of Account Holder(s)	Reference				
Bank/building society account number Branch sort code Name and full postal address of your Bank or Building Society	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.				
To the manager of: Bank/Building Society	Signature(s):				
Address:					
	Date:				

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.

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

- 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.

