

## ASHTON HOYLE SIPP 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:**

Guardian House, Capricorn Park, Blakewater Road, Blackburn, Lancashire BB1 5QR. Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 09469576 T: 0117 316 9991 E: admin@hartleypensions.com W: www.hartleypensions.com



## THIRD PARTY CONTRIBUTIONS

Single Contribution	£ <input type="text"/>	Regular Contribution	£ <input type="text"/>
Contributor Name	<input type="text"/>		
Contributor Address	<input type="text"/>		
Post Code	<input type="text"/>	Date of Birth	<input type="text"/>
Relationship to Member	<input type="text"/>		
Contributor NI Number	<input type="text"/>		
Contributor Driving License/Passport No.	<input type="text"/>		

## 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:

Guardian House, Capricorn Park, Blakewater Road, Blackburn, Lancashire BB1 5QR. Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 09469576 T: 0117 316 9991 E: admin@hartleypensions.com W: www.hartleypensions.com



## 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"><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.

### 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:**

Guardian House, Capricorn Park, Blakewater Road, Blackburn, Lancashire BB1 5QR. Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 09469576. T:0117 316 9991 E: admin@hartleypensions.com W: www.hartleypensions.com

