

01 YOUR DETAILS

Please complete all fields in **BLOCK CAPITALS**

Member Name

Scheme Number NI No.

02 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

03 EMPLOYER 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

Due diligence checks will be completed on the contributor before the contribution is processed

Employer Name

Employer Address

Post Code Company No.

04 THIRD PARTY 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

Contributor Name

Contributor Address

Post Code

Date of Birth (DD/MM/YY)

Relationship to Member

Contributor NI Number

Contributor Driving License/Passport No.

Due diligence checks will be completed on the contributor before the contribution is processed

05 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 (DD/MM/YY)

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 <p><input type="checkbox"/> We will claim basic rate tax relief (20%) on your whole contribution</p>	<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 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 <p><input type="checkbox"/> We will claim tax relief up to a maximum of £3,600 gross (£2,880 net)</p>	<ul style="list-style-type: none"> I am not a UK resident and I have not been for the previous 5 years I am over the age of 75 <p><input type="checkbox"/> We will not claim any tax relief on your contribution.</p>

One box must be ticked

I have triggered my Money Purchase Annual Allowance (MPAA) with another pension arrangement.

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
(DD/MM/YY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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