

SIPP

Additional contribution form

This is an application form to pay an additional or one-off contribution, or to establish a regular monthly contribution to a SIPP by standing order. If you want to change an existing regular contribution made by standing order, please do not complete this form. Instead, you should either email us with your revised instruction at platinumsipp@ajbell.co.uk or write to us at the address shown at the end of this form.

If you are a legal guardian applying on behalf of a member under the age of 18, then please complete this form on behalf of the member and sign the declaration. We cannot process the contribution until this form is completed and signed.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 25 05 609 or by email at platinumsipp@ajbell.co.uk.

Checklist

Please ensure the following documents accompany this form when returning it to AJ Bell:

For single contributions	Yes	N/A	For regular contributions	Yes	N/A
Contribution cheque (member)	<input type="checkbox"/>	<input type="checkbox"/>	Standing order (member) - see important note 3	<input type="checkbox"/>	<input type="checkbox"/>
Contribution cheque (employer) - see important note 4	<input type="checkbox"/>	<input type="checkbox"/>	Standing order (employer) - see important note 3	<input type="checkbox"/>	<input type="checkbox"/>
Single contribution by electronic transfer (member)	<input type="checkbox"/>	<input type="checkbox"/>			
Single contribution by electronic transfer (employer)	<input type="checkbox"/>	<input type="checkbox"/>			

Important notes

- All cheques must be made payable to 'AJ Bell (PP) Trustees Ltd re Client Name' e.g. AJ Bell (PP) Trustees Ltd re John Smith.
- If you would like to make a payment electronically please contact us on 0345 25 05 609 or by email at platinumsipp@ajbell.co.uk. The relevant bank details and a unique payment reference will be provided as part of this process.
- We will only accept payments from a UK bank account.
- Where a member or employer intends to pay regular contributions by standing order, payments MUST be made from a UK bank or building society account. Please note that we do not accept regular electronic payments.
- Single contributions paid by cheque by an employer must also be drawn on a UK bank or building society account in the employer's name.
- If you hold transitional protection and pay a contribution into your SIPP your protection may be revoked. Please contact us for further information if required.
- If the contribution is to be invested once credited to your Platinum SIPP, please contact us as further forms will be required.

1. Personal details

Member's name

AJ Bell Platinum reference

Phone number

Email address

2. Contributions

Please indicate the amount of contributions to be paid to your SIPP:

Single contribution

Member (net)

Employer (gross)

Regular contribution

Member (net)

 per month

Employer (gross)

 per month

If making a member contribution please complete section 3 below; if making an employer contribution please complete section 4 below.

3. Member contribution

Please tick one or more of the following boxes to indicate from which source member contributions are to be funded:

Income from employment

Inheritance

Investment/savings

Property sale

Divorce settlement

Other please specify

Member contributions are contributions paid by the member personally, or by someone else on their behalf, e.g. a parent, grandparent or spouse. They do not include employer contributions.

All member contributions are payable net of basic rate tax (20% for the 2022/23 tax year). We will reclaim basic rate tax from HM Revenue & Customs (HMRC) and credit it to the SIPP cash account. If you pay tax above basic rate, any further tax relief to which you are entitled can be reclaimed via self-assessment. Please note that if you are not the client named on the form but are paying a contribution on their behalf you will not be entitled to reclaim any further tax relief.

4. Employer contribution

All employer contributions are payable gross. Where an employer intends to pay regular contributions by standing order, payments MUST be made from a UK bank or building society account in the employer's name. Single contributions made by cheque must be drawn on a UK bank or building society account in the employer's name.

If your employer is to make contributions on your behalf, please provide your employer's name, registered office address and postcode.

Employer's name

Registered office address

Postcode

Is the employer listed on a recognised stock exchange?

Yes

No

5. Declarations

I declare that, to the best of my knowledge and belief, the details provided in this form are correct, complete and not misleading and that the information provided in the application for my SIPP is still valid, except for any changes specifically advised to AJ Bell Platinum. I further declare that:

- a. I (or the member if this declaration is being made by a parent or legal guardian) am under age 75 and am a relevant UK individual under section 189 of Finance Act 2004
- b. the total of the member contributions paid to this scheme and to other registered pension schemes, on which I (or the member, if this declaration is being made by a parent or legal guardian) am entitled to tax relief, under section 188 of the Finance Act 2004, will not exceed, in any tax year, the higher of:
 - i. the basic amount (£3,600 gross for the 2022/23 tax year); or
 - ii. 100% of my (or the member's if this declaration is being made by a parent or legal guardian) relevant UK earnings as defined in section 189 of Finance Act 2004 in that tax year.
- c. I will give notice to the scheme administrator if an event occurs as a result of which I (or the member if

this declaration is being made by a parent or legal guardian) will no longer be entitled to relief on member contributions, under section 188 of Finance Act 2004. I will give notice by the later of:

- i. 5 April in the year of assessment in which the event occurs; or
- ii. the date which is 30 days after the occurrence of that event.

Please sign and date the application and email a scanned copy to platinumsipp@ajbell.co.uk, or return via post to
AJ Bell Platinum SIPP
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Tel: 0345 25 05 609

Fax: 0345 40 89 200

I understand it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

If the client is under 18 the parent or legal guardian must sign.

Name

Date

Signature

Capacity in which signed (please tick)

Client

Parent/guardian