

SIPP

Disinvestment request form

This form authorises the Trustees to request the return of cash from the investment listed below.

If assets need to be sold down within the investment in order to create the cash, you will also need to include a clear investment instruction on this form.

Please sign, date and return the form to:

AJ Bell Platinum SIPP
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Alternatively, you can send a scanned copy to platinuminvestments@ajbell.co.uk. Please note that a small number of investment providers require an original signature. In these cases, you will also be asked to send an original form.

On receipt, we will contact the investment provider and liaise with them directly regarding the return of funds.

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.

1. SIPP details

Name of SIPP

SIPP reference number

2. Investment provider

Name of investment provider

Reference/account number

Amount required

Is this investment to be closed?

☐

Yes

☐

No

Additional information

3. Scheme bank details (to be completed by scheme administrator)

Bank name

Account name

Branch sort code

Account number

Reference

4. Member signature

Signature

Date

Name

5. AJ Bell (PP) Trustees' signatures

Signature

Date

Name

Signature

Date

Name

6. Important notes

1. Please note that additional documentation may be required and we accept no liability or responsibility for any actions caused by delays in payment.
2. An investment transaction fee of £30 plus VAT will be charged for this transaction.