

SIPP

Payment authorisation form for AJ Bell investment products

This form authorises the Trustee to make the payment described below from the Bank of Scotland SIPP Account to the AJ Bell Dealing Account or the AJ Bell Investcentre General Investment Account held in the name of the Platinum SIPP.

Please sign, date and return this form to:

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

Alternatively, you can email a scanned copy to platinuminvestments@ajbell.co.uk.

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 member

SIPP reference

OR

Name of Group SIPP

Group SIPP reference

Please note: if a payment is being made in respect of an investment owned jointly by a number of SIPPs, you will need to specify the Group SIPP details in order that the payment can be made from the relevant Group SIPP account.

2. Dealing Account/General Investment Account details

Account type

AJ Bell Dealing Account

☐

AJ Bell Investcentre General Investment Account

☐

Account reference

3. Amount of payment

Amount

£

Signed

Name(s)

Capacity

SIPP member(s)

If signing in respect of a Group SIPP, all SIPP members must sign.

4. Important notes

1. We accept no liability or responsibility for any actions caused by any delays in payment.
2. Additional charges may be incurred if there are insufficient funds in the relevant SIPP deposit account to meet the payment.
3. Payments are made on the strict understanding that there will be no rebates, directly or indirectly related to the payment, to the member or anyone connected with the member. Failure to adhere to this requirement may jeopardise the tax-exempt approved status of the SIPP.
4. A scanned or faxed copy of this form may be acceptable at our sole discretion.

Official use only

Processed by

Date

Checked by

Date

Authorised by

Date

Notes