SIPP Additional Contribution Form

You can use this application form to pay an additional one-off contribution or to set up regular monthly contributions by direct debit. If you wish to vary your existing regular contribution direct debit arrangements, simply write to us with details of the changes and do not complete this form. We cannot process your contribution until we receive this form 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 in audio format, please contact us on 0800 279 3667* or by email at BarclaysSIPPadmin@ajbell.co.uk

Checklist

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

Barclays Smart Investor
SIPP Administration Team
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

	Yes	N/A		Yes	N/A
Contribution cheque (member)	☐	☐	Direct debit form (member)	☐	☐
Contribution cheque (employer)	☐	☐	Direct debit form (employer) – see important note 3	☐	☐

Important notes:

1. All cheques should be made payable to **'Sippdeal Trustees Limited re (member name)'**.
2. Unless member contributions are made by cheque from a UK bank or building society account in the name of the member, or by bank draft/cheque drawn on a UK bank or building society account, further checks may be required.
3. Where an employer intends to pay regular contributions by direct debit, or single contribution(s), payments MUST be made from a UK bank or building society account in the employer's name.
4. Please always check that the bank account details used for electronic payments match the details provided on the Barclays Smart Investor website.

1. Personal Information

Please provide the following information about yourself:

Title (delete as applicable) Mr / Mrs / Miss / Ms / Other Surname

Forename(s) in full (no initials)

National Insurance No. ☐☐☐☐☐☐☐☐☐

Sex Male / Female Occupation

Approximate annual earnings (if applicable) £ p.a.

Permanent residential address

Postcode ☐☐☐☐☐☐☐ Country

AJBell

BARCLAYS

Daytime telephone | Evening telephone

Mobile telephone

Email address

Marital status (delete as applicable) Single / Married / Divorced / Separated / Widowed / Civil Partner

SIPP account number

2. Contributions

Please indicate the amount of contributions that you intend to pay to your SIPP:

Single contribution Member (net) £ Employer (gross) £

Regular contribution Member (net) £ per month Employer (gross) £ per month

Member Contribution

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

i) Income from employment ☐
ii) Investment/Savings ☐
iii) Inheritance ☐
iv) Property Sale ☐
v) Divorce settlement ☐
vi) Other (please specify)

Member contributions are contributions paid by the member personally, or by someone else on the member's 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 2020/21 tax year). We will reclaim basic rate tax from HM Revenue and Customs (HMRC) and credit it to your SIPP Cash Account. If you pay tax at a higher rate than basic rate you can claim any further tax relief to which you are entitled via self-assessment.

Please note that if you are paying contributions on behalf of the member, you will not be entitled to reclaim the difference between higher and basic rate tax relief.

All employer contributions are payable gross.

Where an employer intends to pay regular contributions by direct debit, payments MUST be made from a UK bank or building society account in the employer's name. Single contributions must also be paid from a UK bank or building society account in the employer's name.

If your employer is to pay contributions, please provide your employer's details:

Employer's name

Address

Postcode

Employer's telephone number

Is the employer listed on a recognised stock exchange? Yes ☐ No ☐

3. Declarations

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

I further declare that:

a) I 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 am entitled to tax relief, under section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
   i) the basic amount (£3,600 gross for the 2020/21 tax year); or
   ii) 100% of my relevant UK earnings as defined in Section 189 of Finance Act 2004 in that tax year;
c) the declaration in b) is correct, to the best of my knowledge and belief;
d) I will give notice to the Scheme Administrator if an event occurs, as a result of which I will no longer be entitled to relief on member contributions, under section 188 of Finance Act 2004. I will give this notice by the later of;
   i) 5 April in the year of assessment in which the event occurs; and
   ii) The date which is 30 days after the occurrence of that event.

Please sign and date the application and return it to:

Barclays Smart Investor
SIPP Administration Team
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

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

Signed

Print name

Date / /

A copy of your application document and of the Rules of the Scheme is available on request from AJ Bell Management Limited, 4 Exchange Quay, Salford Quays, M5 3EE.

*Calls may be recorded so that we can monitor the quality of our service and for security purposes. Our opening hours are 7.30am to 7.00pm Monday to Thursday, 7.30am to 6.00pm on Friday (excluding bank holidays) and 9.30am to 12.30pm on Saturday.

Calls will cost no more than 6p per minute plus your phone company's access charge. International calls may be charged at a higher rate – please check with your telecoms provider. Calls to 0800 numbers are free from UK land lines and personal mobiles.

Barclays Investment Solutions Limited provides wealth and investment products and services (including the Smart Investor investment services) and is authorised and regulated by the Financial Conduct Authority and is a member of the London Stock Exchange and NEX. Registered in England. Registered No. 2752982. Registered Office: 1 Churchill Place, London E14 5HP.

Barclays Bank UK PLC provides banking services to its customers and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No. 759676). Registered in England. Registered No. 9740322. Registered Office: 1 Churchill Place, London E14 5HP.

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Authority and on the FCA Register under FCA Register number 211468. Sippdeal Trustees Limited is a wholly owned subsidiary of AJ Bell Management Limited, registered in England No. 4050222. Registered Office: 4 Exchange Quay, Salford Quays, M5 3EE. Sippdeal Trustees Limited does not conduct any regulated activities, and is, therefore, not regulated.

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