Pension Savings Account



Application to set-up or amend regular payments or a lump sum from an employee, paid from an employer bank account, funded from employee's salary after tax.

Please complete the form in BLOCK CAPITALS using black ink.

You should use this form to make a one off or regular payments to an existing Pension Savings Account from you as an employee, paid from your employer's bank account but where the source of funds is not the employer but from the employee's salary after tax. Such payments will be setup as a third party contribution so that they receive the appropriate tax relief, but can be paid from a business bank account.

If you already have a regular savings plan from the same employer bank account we will need to set up a new Pension Savings Account for the employee contribution which will be recorded as a third party savings plan.

PLEASE NOTE: You cannot transfer assets from one Pension Savings Account to another.

When completed please upload and send or return to Fidelity, PO Box 391, Tadworth, KT20 9FU

Abo																													
Title																													
М	lr		Mrs	3		Ms	S		Ot	her:																			T
						ı			J																				
Last n	ame	е									1																		
First a	ınd	othe	er no	am	es i	n fu	ıll																						
_									_																				_
Date o	of b	irth	טט) 	MN	MYY 	YY)	1		lo	wn	of	birth	1	_	_							I	_	_	_	_	_	_	٦
Count	rv o	f bii	rth																										
															Т				Т	Т	Т								_
Emplo Er	mploy	yed			nal	only	y? (Pled	ase	ma	rk c	ın X	in th	ne b	ox)												,		
Are you (Please Are you	mploy Du a Du a e m	yed I UK I UK ark	Na Na an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	r e ot es b	ther elov	w)	untr	ies?	? [,		
Are you (Please (Pleas	mploy Du a Du a e me Du a e me	yed I UK ark I Na ark	Na Na an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	re of es b	ther elov	~) ~)			? [
Are you (Please Are you	mploy Du a Du a e me Du a e me	yed I UK ark I Na ark	Na Na an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	re of es b	ther elov	~) ~)	untr		? [_
Are you (Please (Pleas	mploy Du a Du a e me Du a e me	yed I UK ark I Na ark	Na Na an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	re of es b	ther elov	~) ~)			? [
Are you (Please (Pleas	mploy a specific and	yed UK UK ark Na ark ty 1	Na Na an > tion an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	re of es b	ther pelov pelov Nat	w) ione		2	? [
Are you (Please Nation	mploy a specific and	yed UK UK ark Na ark ty 1	Na Na an > tion an >	tion tion (in	nal the	and box	d No x ar	atio nd li	nal ist a untr	of	one the	or i	mo i intri	re of es b	ther pelov pelov Nat	w) ione	ality	2	? [
Are you (Please Nation Nation In ord require is a U countril	nalited t K Ciyy th	yed UK UK ARK ARK ARK ARK ARK ARK	Na N	tion tion (in al (in	nal the of N the	ance box box box box wcho atio	J Nex ar	ational line country and line line line line line line line line	rad	of of of of of other order of other of other of other	one their online promise promise ance	y? r cou y? r cou oduc for ce Nu	ntri- intri- intri- its (interior one mb	re of the contract of the cont	Nat Nat estm heir f yo	w) ion ion ent nat	ality Tru	ysts alitie	or due	or i	epo atio	ortii ona	ng p	our a i	pos nati	es. ona	If you	our f an	cli
Are you Are you (Please Are you (Please Nation Nation In ordinated require is a U	nalited t K Ciyy th	yed UK UK ARK ARK ARK ARK ARK ARK	Na N	tion tion (in al (in	nal the of N the	ance box box box box wcho atio	J Nex ar	ational line country and line line line line line line line line	rad	of of of of of other order of other of other of other	one their online promise promise ance	y? r cou y? r cou oduc for ce Nu	ntri- intri- intri- its (interior one mb	re of the contract of the cont	Nat Nat estm heir f yo	w) ion ion ent nat	ality Tru	ysts alitie	or due	or i	epo atio	ortii ona	ng p	our a i	pos nati	es. ona	If you	our f an	cli

Driving Licence number (if applicable - 18 characters as shown on your photocard)

About you

OR																
Bank trai	nsfer – plea	ise use th	e following	details:												
Bank:	BAR	CLAYS BA	ANK PLC								А	ccount	numb	oer:	33	303
Account name			TEE (UK) L								Si	ort cod	e:		20	0-93
Reference:	IMPC		Please ens			,				•		,. ,			IAL IN	NSL
This form must											ed to	the pa	yer's	bank	acco	ount
DO NOT use the	ne bank det	tails abov	e to send	a payme	nt witho	out compl	eting an	d return	iing a	form.						
Source of th	is investm	nent (Du	ie to regi	latory	requir	ements	we mu	st obta	ain co	onfirma	tion	abou	t the	sou	rce c	of t
contribution	before we	e can a	ccept you	r appli	cation	. Please	tick to	confir	m the	e sourc	:e.)					
Income from	om salary															
When would	vour em	plover	like the r	eaular	contri	butions	to be	taken	from	n their l	ban	k acc	ount	?		
1st	OR	10t					OR		25th							
					' '		OK		2500							
130																
How often w	ould the	y like to	make a	payme	ent?											
	ould the	y like to Quarterl		7	ent? 6 Mont	hs [An	nually								
How often w		Quarterl	у	Every	6 Mont	l		,								
How often w Monthly Please allow Collections w	twelve wo	Quarterling dangert on the	ys for us to next ava	Every set up	6 Mont the Re aymen	egular So t date ar	avings F	Plan. w the fi								
How often w Monthly Please allow	twelve wo	Quarterling dangert on the	ys for us to next ava	Every set up	6 Mont the Re aymen	egular So t date ar	avings F	Plan. w the fi					ion.			
How often w Monthly Please allow Collections w	twelve wo	Quarterl rking da rt on the one regu	ys for us to next ava lar contrib	Every set up ilable poution, w	6 Mont the Re aymen ve will i	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi ollection	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m	twelve wo	Quarterl rking da rt on the one regu	ys for us to next ava lar contrib	Every set up ilable poution, w	6 Mont the Re aymen ve will i	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi ollection	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m	twelve woo	Quarterling da rt on the one regu	ys for us to next ava lar contrib	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m	twelve woo	Quarterling da rt on the one regu	ys for us to next ava lar contrib	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m	twelve woo Il then sta ore than o	Quarterly rking da rt on the regular cor	ys for us to next ava lar contrib ntribution	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the	twelve woo Il then sta ore than o	Quarterly rking da rt on the regular cor	ys for us to next ava lar contrib ntribution	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the	twelve woo Il then sta ore than o	Quarterly rking da rt on the regular cor	ys for us to next ava lar contrib ntribution	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the	twelve woo Il then sta ore than o	Quarterly rking da rt on the regular cor	ys for us to next ava lar contrib ntribution	Every o set up ilable po oution, w	6 Mont the Reaymen we will u	egular So t date an use the s	avings F nd follo ame co	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the	twelve wood lithen state ore than or thich regularized payer to compare the compared to the co	Quarterly rking da rt on the one regular cor omplete	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the yer details for	twelve world then star ore than or than or than or thich regular payer to compare the compared to the compared	Quarterly rking da rt on the one regular cor omplete	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the yer details for Employer's r	twelve world then star ore than or than or than or thich regular payer to compare the compared to the compared	Quarterly rking da rt on the one regular cor omplete	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the yer details for Employer's r	twelve woo Il then sta ore than o Thich regular payer to co or employ name egisterec r/name	Quarterly rking da rt on the one regular correction omplete ree con	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the Employer's r Building number	twelve woo Il then sta ore than o Thich regular payer to co or employ name egisterec r/name	Quarterly rking da rt on the one regular correction omplete ree con	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the Employer's r Building number	twelve woo Il then sta ore than o Thich regular payer to co or employ name egisterec r/name	Quarterly rking da rt on the one regular correction omplete ree con	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the Employer's r Building number	twelve woo Il then sta ore than o Thich regular payer to co or employ name egisterec r/name	Quarterly rking da rt on the one regular correction omplete ree con	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		cce)		
How often w Monthly Please allow Collections w If you have m Date after w Please ask the Employer's r Building number	twelve woo Il then sta ore than o Thich regular payer to co or employ name egisterec r/name	Quarterly rking da rt on the one regular correction omplete ree con	ys for us to next ava lar contribution the Direct	Every o set up ilable poution, w s shoul Debit fo	6 Mont the Re aymen re will I	egular So t date an use the s se (lear	avings F nd follo ame co ve blan	Plan. w the fi	n date	e for ec	ach i	nstruct		ce)		





Instruction to your bank or building society to pay by Direct Debit

Fidelity, PO Box 391, Tadworth, KT20 9FU							
	Service	User Nu	mber	1	1	1	٦
	4	4	9	7	0	6	
Name(s) of account holder(s)	Referer	ice					_
Bank/building society account number	Please detailed Guaran	in this Instee. I undentee and,	IPP Trust struction s erstand th	ee (UK) l subject to nat this In	imited Di the safec struction i	rect Deb guards as may rema	its from the account ssured by the Direct Deb ain with FIL SIPP Truste ically to my bank/building
Branch sort code							
Name and full postal address of your bank or building society To: The Manager Bank/building society							
Address	Signatur	e(s)					
Postcode	Date						

Banks and building societies may not accept Direct Debit Instructions for some types of account

DDI2

4 Investment choices

4.1 Decision Maker

Where the decision maker for granted power of attorney, or													viduals
Who is making the investme	nt decision o	n behalf d	of the cli	ent? (pl	ease	select	one)						
Power of attorney	OR	Court	of Protec	tion ap	pointe	ed de _l	puty						
Last name													
First and other names	in full												

4.2 Investing your contribution

We will follow your investment instructions below, but where we cannot achieve this we will hold your money as cash within your account.

If you have more than one regular contribution, we will use the same investment details for each instruction.

Should any of your new funds pay income, we will follow your existing preferences for income payments on your account. If you are opening a new account, then income payments will be automatically reinvested for you where possible.

Fund code/Ref.	Investment name	Percen	ntage	
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•	%
			•]%
			•	%

FAS_PensionEmployeeThroughEmployerInt/10.23/v25.0

4 Investment choices (continued)

Fund code/Ref. Investment name	Percentag	е	
		•	%
		•	%
		•	%
		•	%
		•	%
]%
			<u>%</u>
]•	<u>%</u>
		•	%
		•	%
		•	%
		•	%
		•	%
		•	%
		•	
		•	%
		•	%
		•	%

FAS_PensionEmployeeThroughEmployerInt/10.23/v25.0

4 Investment choices (continued)

Fund code/Ref.	Investment name	Percentage
		• %
		•%
		• %
		• %
		• %
		• %
	Amount to be paid into cash within my account	• %
	Totals should add up to 100%	• %

(_	
0	?	,
1	?	1
(77		
-	2	
	Š	
	2	
	7	
F	0	
-	c	
L	2	
	2	
	2	,
ر د د	7	

5 Adviser details and declaration	(to be completed by your adviser)
5.1 Full name of the adviser	
5.2 Unique agency number	
5.3 FCA firm reference number FC	A individual reference number
5.4 Adviser remuneration	
Initial fee % or £	Number of initial fee instalments
setup an Adviser Ongoing Fee this must be done online of	
nominated investment is already in place you need to lo	there is an insufficient cash balance within the account? Where a g in to Pension Quote & Transact to make changes.
Fund code/Ref. Investment name	
Deducting Adviser Charges: All fees will be deducted from cash within your client's account. If the (if chosen) or typically the largest fund holding.	ere is an insufficient balance, we will sell units from a nominated fund
By signing below I confirm that:	
The client has no pension protections or advice has been given in	
 The employer is not the source of funds for the lump sum or regul The contributions are being paid from the employee's pay after in 	
I am authorised to conduct this type of business. I have provided the client with the Doing Rusiness with Fidelity As	dviser Solutions and Client Terms and the relevant key information documents.
I have provided each party making payments to the client's acco	
	ded is correct, complete and not misleading to the best of my knowledge. Stection statement within the Client Terms and has agreed that their personal data
can be used for the purposes described therein.	rection statement within the chefit refins and has agreed that their personal data
 I have a signed client authority form which authorises the deducti My client is under the age of 75 and that they are not a US perso 	
I consent to your reliance upon the fact, that I have verified the id	dentity of the client named in section 1 in accordance with the Money Laundering
Regulations and standards set in Guidance issued by the JMLSG. The total of my client's contributions to all applicable pensions are	re within allowable limits for tax relief, in particular the Annual Allowance and the
Money Purchase Annual Allowance.	, ,
 If an event occurs where my client is no longer entitled to tax relie which the event occurs and 30 days of the event. 	ef on their contributions I will give notice by the later of the end of the tax year in
Adviser signature	Date
	(DDMMYYYY)
1	

Important: A Direct Debit Guarantee should be retained by the relevant payer.

The Direct Debit Guarantee



- · This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, FIL SIPP Trustee (UK) Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request FIL SIPP Trustee (UK) Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by FIL SIPP Trustee (UK) Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – If you receive a refund you are not entitled to, you must pay it back when FIL SIPP Trustee (UK) Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.