

Self Invested Personal Pension

SIPP



Supplementary Contribution Application Form

The Retirement Planning Specialists

www.minervasipp.co.uk

Supplementary Contribution Application Form

Section A - Personal Details

Please supply the following personal information.

Title	Forename(s)		
Surname			
Member Number		NI Number	
Permanent residential address			
			Postcode

Section B - Contributions

Personal Contributions

How much would you like to pay into your SIPP?

Single Contribution:

Cheques should be made payable to 'Minerva SIPP'.

Regular Contribution:

Frequency of contributions

Monthly Quarterly Half Yearly Yearly

Start date for regular contribution payments:

Start Date (DD/MM/YYYY)

If regular contribution payments are to be made to your SIPP please forward a completed Standing Order Mandate to InvestAcc Pension Administration Limited.

Will your personal contributions be paid to InvestAcc Pension Administration Ltd by a third party, other than your employer?

Yes No

If 'yes' please provide the name and address of the third party:

Title	Forename(s)
Surname	
Any other name the third party has been, or is known by	
	Date of Birth (DD/MM/YYYY)

Or

Organisation Name	
Address of third party	
	Postcode

You will need to supply documentary evidence of the identity and address of the third party.

If applicable InvestAcc Pension Administration Limited will reclaim basic rate tax on personal contributions. The tax reclaim will take between 7-11 weeks. Please note that the value of the reclaim can only be invested once it has been paid into your designated SIPP bank account and it has cleared.

Employer Contributions (if applicable)

All employer contributions are paid gross.

How much would your employer like to pay into your plan?

Single Contribution:

Regular Contribution:

Frequency of contributions

- Monthly Quarterly Half Yearly Yearly

Start date for regular contribution payments:

Start Date (DD/MM/YYYY)

If your employer is making contributions to your SIPP, do you give authority for InvestAcc Pension Administration Limited to correspond directly with them?

- Yes No

If 'Yes' please provide contact details for your employer:

Name of Employer	
Contact Name	
Employers address	
	Postcode
Telephone	Fax
Country of establishment / incorporation	
Registered number (if applicable)	
Nature of business	
Registered address, if different from correspondence address:	
	Postcode

If your employer wishes to contribute to your SIPP please forward them a Standing Order Mandate if applicable and return to InvestAcc Pension Administration Limited.

Section C - Declaration

- a) I confirm that to the best of my knowledge and belief, the particulars given on this Application Form are correct and complete.
- b) I undertake to tell InvestAcc Pension Administration Limited in writing within 30 working days if:
- There is any change in my residency status
 - There is any change in my name or permanent residential address.
- c) For contribution purposes I can confirm I am under age 75 and I am a relevant UK individual.
An individual is a relevant UK individual for a tax year if:
- The individual has **relevant UK earnings** chargeable to income tax for that tax year, or
 - The individual is resident in the United Kingdom at some time during that tax year, or
 - The individual was resident in the UK at some time during the five tax years immediately before the tax year in question and was also resident in the UK when they joined the pension scheme, or
 - The individual has for that tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of the Income Tax (Earnings and Pensions) Act 2003), or
 - The individual is the spouse or civil partner of an individual who has for the tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of the Income Tax (Earnings and Pensions) Act 2003).

For relevant UK individuals who do not have relevant UK earnings, the maximum contribution is the 'basic amount' (currently £3,600). Relevant UK earnings means:

- Employment income such as salary, wages, bonus, overtime, commission providing it is chargeable to tax under Section 7(2) ITEPA 2003

- Income chargeable under Part 2 ITTOIA 2005, that is income derived from the carrying on or exercise of a trade, profession or vocation (whether individually or as a partner acting personally in a partnership)
- Income arising from patent rights and treated as earned income under section 833 (5B) ICTA 1988
- General earnings from an overseas Crown employment which are subject to tax in accordance with section 28 of ITEPA 2003.

Where relevant UK earnings are not taxable in the United Kingdom due to section 788 of ICTA 1988 (double taxation agreements), those earnings are not regarded as chargeable to income tax and so will not count towards the annual limit for relief.

- d) I understand that this application determines whether I am entitled to basic rate tax relief at source on my contributions.
- e) I agree that the total contributions to any registered pension scheme in respect of which I am entitled to tax relief will not exceed the higher of:
- £3,600, or
 - My relevant UK earnings for that tax year.
- f) If I am no longer entitled to tax relief on my contributions I will undertake to tell InvestAcc Pension Administration Limited in writing no later than:
- 5 April in the year of assessment in which this occurs, or
 - Within 30 days of this exchange.
- g) I understand it is an offence to make false statements and that the penalties are severe and could lead to prosecution.

Applicant Signature	Date
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SIPP Cancellation Rights - Contributions

When you make your contribution we will normally offer you the right to cancel within 30 calendar days of us accepting your application. Within this period InvestAcc Pension Administration Limited will retain all monies in your designated SIPP bank account until the cancellation period is up before we can proceed with actioning your benefit and investment instructions.

If you wish to waive your right to this 30-day cancellation period and take your benefits and/or investments immediately you can complete the following waiver:

I would like to waive my right to this 30 day cancellation period and I fully understand the implications of this, including the fact that once I have waived my right to this cancellation period, I will no longer be able to have any contributions detailed in this form refunded.

Applicant Signature	Date
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The Minerva SIPP and Flexi SIPP are offered without pensions advice.

A SIPP may not be suitable for all investors. If in doubt you should consult an independent financial adviser.

InvestAcc Pension Administration Limited is the Operator and Scheme Administrator and is responsible for the maintenance and running of the scheme.

InvestAcc Pension Trustees Limited is the Scheme Trustee.

The levels of and bases of taxation can change. The value to an investor of any tax benefits will depend on that investor's tax position. Investors should consult their own tax advisers in order to understand any applicable tax consequence.

InvestAcc Pension Administration Limited is authorised and regulated by the Financial Services Authority.

InvestAcc Pension Administration Limited is registered in England and Wales, Company number 7118349.

InvestAcc Pension Trustees Limited is registered in England and Wales, Company number 2875892.



InvestAcc Pension
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