

The Minerva Self Invested Personal Pension

Minerva SIPP



Adviser Agreement

The Retirement Planning Specialists



Pension Administration Limited

www.minervasipp.co.uk

Adviser Agreement

This form should only be completed if you wish for your appointed FSA regulated Financial Adviser to take a fee from your fund.

To be completed by the Member

I have appointed:

(‘the company’)

to arrange my Minerva SIPP and provide me with ongoing advice, where indicated below, in respect of the investments held in my Minerva SIPP. Set out below is the basis of remuneration that I have agreed with the Company in respect of:

Establishing the arrangement:

either

%

Percentage in words

of the initial investment.

or an amount of

£

Amount in words

Ongoing Advice:

either

% per annum

% in words

of the value of the investments in respect of which this agreement applies each year as set out in the Annual Valuation Statement.

or an amount of

£

per annum

Amount in words

Please state your disinvestment preferences for all ongoing advice.

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Where further investments or transfers are received after the Minerva SIPP has commenced, the same terms will apply.
(The above amounts are exclusive of VAT if applicable).

I confirm my agreement to these charges and hereby authorise and request the scheme administrator InvestAcc Pension Administration Limited to pay them on my behalf, in accordance with the provisions of the Minerva SIPP, from the funds held in my Minerva SIPP, until otherwise instructed.

These terms amend and replace any existing remuneration arrangements, which would otherwise apply to the Minerva SIPP.

I understand InvestAcc Pension Administration Limited will only pay these charges if my Financial Adviser is authorised by the Financial Services Authority.

Full Name of Member	
Members Signature	Date

To be completed by your Financial Adviser

InvestAcc Pension Administration Limited payment terms are 28 days from receipt of your invoice.

Fees will only be paid from the pension plan upon receipt of an invoice on your Financial Adviser's headed paper stating a monetary amount. The invoice is to be addressed to Minerva SIPP followed by the member(s) name(s) and sent to InvestAcc Pension Administration Limited, Minerva House, Port Road Business Park, Carlisle, CA2 7AF

Fees to be paid by Cheque by CHAPS / BACS Please ✓

Bank Name	Branch
Account Number	Sort Code — —
Payment Reference	

Advisers Name	Advisers Company Name
Advisers Signature	Date

The Minerva SIPP is 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
Administration Limited

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