

The Flexi Self Invested Personal Pension

# Flexi SIPP



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## **Scheme Establishment Information**

The Retirement Planning Specialists

[www.minervasipp.co.uk](http://www.minervasipp.co.uk)

# Scheme Establishment Information

Scheme Name
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Number of initial members	Any expected additional members to join in next 12 months (not included above)?
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The Registered Scheme Address will be registered at Minerva House, Port Road Business Park, Carlisle, CA2 7AF.  
Please state below the contact details that InvestAcc Pension Administration Limited should use for day to day correspondence with the member trustee(s) (this should be one of the member trustees of the scheme, nominated and agreed by all current and future members):

Member Trustee Lead Contact Name	
Company or Business Name (if applicable)	
Address	
	Postcode
Telephone number	Mobile number
Fax Number	Email address

## Financial Adviser Details

Firm Name	
Firm Address	
	Postcode
Telephone number	Mobile number
Fax Number	Email address
FSA Registration Number	

## Financial Adviser Contact

Name	
Title	
Telephone Number (if different)	Fax Number (if different)
Email address	

If you are setting up the Flexi SIPP with the intention of having more than one member, how would you describe the relationship of the majority of members of the scheme (please tick):

- Family
- Business Partners
- No common link
- Other

If other, please specify
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Is the scheme expected to hold Protected Rights funds?

If so, we will apply for an Appropriate Scheme Contracted Out Number on your behalf:

- Yes
- No

This Scheme Establishment Information can be signed by one or more trustees, or your financial adviser.

## Declaration

**I confirm that I am completing this information in good faith and will inform all of the member trustees of the information on this form.**

Signed	Date
Name	
Capacity (trustee or financial adviser)	

The Flexi 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  
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**[www.minervasipp.co.uk](http://www.minervasipp.co.uk)**

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