

SIPP application form

1 Personal details

Title

Surname

Forename/s (in full)

Date of birth

Place/country of birth

Intended retirement age

Nationality

Sex

Marital status

Spouse's/partner's name

Permanent residential
address including
postcode

**Please note: work or 'care of' addresses contravene HMRC requirements
and cannot be accepted**

*Date moved to
this address

* This information must be completed fully and will be used to perform an electronic identity check for anti-money laundering purposes.

If you have lived there
for less than three years,
your previous permanent
residential address

**Contact
numbers**

Home

Office

Mobile

Email address

National Insurance number

2 Status

In order to ascertain your membership status, please tick ONE of the following:

1. Employed persons. A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of employment income as defined in the Act.

2. Pensioners. A person chargeable to tax under Part 9 of the Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of a pension.

3. Self Employed persons. A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Trading and Other Income) Act 2005 for the tax year concerned in respect of annual profits or gains arising or accruing from any trade, profession or vocation carried out by an individual.

4. Children. A child under 16

5. Any others not falling **1, 2, 3 or 4** above, please select below

Caring for one or more
children aged under 16

Caring for a person aged 16
or over

In full-time education

Unemployed

Retired

Other

If other, please
provide details

Employment details

If you have ticked either Box 1 or Box 3, please give the full name and address of the employer if employed, or your trading details if self-employed.

Job title/occupation

Earnings/profits in current tax year

3 Contributions

Please make any cheques payable to 'Talbot and Muir SIPP re: [Initial, Surname]'. Other payment methods include standing order, BACs or direct credit.

Do you wish to make contributions?

Yes

No

Regular contributions £

Member (net) £

Member (gross)

£

Employer (gross)

This will be paid (Frequency)

Single contributions £

Member (net) £

Member (gross)

£

Employer (gross)

Date MPAA* applicable

*Money Purchase Annual Allowance (MPAA) is £10,000. It is applicable if you access any pension arrangement under Flexi-access Drawdown and take an income or you received an uncrystallised funds pension lump sum.

4 Source of wealth and funds

Please tick one or more boxes below to indicate the source of the funds for this application

	Member	Third party
Income from employment		
Savings and/or investments		
Inheritance		
Divorce settlement		
Transfer from another regulated scheme		

5 Details of transferring schemes

Transfer one – company/
scheme name

Policy number(s)/scheme
reference

Address

Postcode

Name of contact

Telephone number

Email address

Personal Pension	Defined contribution occupational
Defined benefit occupational	Section 32 buyout
Other	

If other, please
provide details

Are there any Safeguarded Benefits? (Guarantees)	Yes	No	
Are the funds crystallised? (tick one)	No	Partially	Fully
Transfer value (or estimate)			
Does this comprise of the full plan value?	Yes	No	Please note crystallised arrangements can only be transferred in full.
In-specie transfers are subject to pre-approval by Talbot and Muir and we will require a completed paper transfer forms for in-specie transfers. Please contact Advisor Support for details.			
Do you intend to transfer this plan in-specie?	Yes	No	
Does this transfer have a protected pension age? Please provide evidence of any protected benefits, if not already provided.	Yes	No	If these boxes are left blank we will assume the answer is no.
Transfer two – company/ scheme name			
Policy number(s)/scheme reference			
Address			
Postcode			
Name of contact			
Telephone number			
Email address			
Personal Pension		Defined contribution occupational	
Defined benefit occupational		Section 32 buyout	
Other			

If other, please
complete details

Are there any Safeguarded
Benefits? (Guarantees)

Yes

No

Are the funds crystallised?
(tick one)

No

Partially

Fully

Transfer value (or estimate)

Does this comprise of
the full plan value?

Yes

No

Please note crystallised arrangements
can only be transferred in full.

In-specie transfers are subject to pre-approval by Talbot and Muir and we will require a completed
paper transfer forms for in-specie transfers. Please contact Advisor Support for details.

Do you intend to transfer
this plan in-specie?

Yes

No

Does this transfer have a
protected pension age?
Please provide evidence of
any protected benefits, if
not already provided.

Yes

No

If these boxes are left blank we will
assume the answer is no.

If you are making additional transfers in, please complete our SIPP Additional Transfer Form.

6 Investments Intentions

Please indicate your investment intentions for your client's fund. If this section is not completed
then pending the receipt of investment instructions, and if necessary the appropriate application
forms, any funds received will be held in the pension scheme's designated current account.

Investment manager
(if applicable)

Address

Funds intention
for investments

7 Expression of wishes

Whilst the Scheme Administrator may take into account this expression of wishes, this request is not binding upon them.

Although the form allows space for three nominations, there is no restriction on the number of people you can nominate. If there are more than three nominations, please provide details on a separate sheet. Please make sure the proportions add up to 100%.

If you wish to choose a person(s) whom you would like to benefit only if your other proposed recipients have died before you, please explain this. (For example: wife 100%, or if she dies before you, parents 50% each).

If you wish any payments to a proposed person(s) to be conditional on them surviving you by a relatively short period of time, for example for tax reasons, please explain this and give the name of the other recipients to take their place.

Name and address	Relationship	% of Benefit
		Total 100%

8 Financial adviser section

We only open a SIPP for clients who have been advised to do so by an FCA regulated adviser.

Name of adviser

Name of adviser firm

Address

Postcode

Company FCA
Reference Number

Preferred contact number

Email address

For literature in alternative formats, such as Braille, large print, audio or E-Text, please call us on 0115 841 5000 (or via Relay UK on 18001 0115 841 5000).

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