

Premier SIPP Contribution Form

Member Details

Member Name:

SIPP Reference Number:

Your Personal Contribution: £ net

Note: Your personal contributions are paid net of basic rate tax. Options UK Personal Pensions LLP will reclaim this tax from HM Revenue & Customs and arrange for this to be paid into your SIPP. Any additional rate tax relief should be reclaimed through your Self-Assessment tax return.

Frequency:

Please confirm the source of your contribution:
 (e.g. salary, inheritance, non-pension savings or investments)

Your employer's contribution: £ gross

Frequency:

Note: Contributions paid by cheque should be drawn on a UK bank account and made payable to "Premier SIPP - your name" or if you are a member of The Personal Pension Trust "The Personal Pension Trust - your name". If you wish to set up regular contributions by standing order then please arrange to complete your bank's standing order mandate.

Are you using carry forward?:

If yes, please complete the table below with details of the contributions you have paid to other schemes for the previous tax years, but excluding any contributions you have made to this SIPP.

Tax Year	Contributions made to other schemes?
	£
	£
	£
Current tax year	£
Total	£

Are you affected by the tapered annual allowance?

If yes, please confirm your adjusted income for the current tax year

Member Declaration

I confirm, acknowledge and understand;

1. to the best of my knowledge and belief the information contained in this form is in all respects true and accurate.
2. the total contributions to this and any other registered pension scheme of which I am a member and which I am entitled to tax relief in any tax year under Finance Act 2004 will not exceed the higher of:
 - a) £3,600, or
 - b) 100% of my relevant UK earnings, as defined in Finance Act 2004
3. that I must and will notify Options UK Personal Pensions LLP if an event occurs, as a result of which I will no longer be entitled to tax relief on my contributions, by the later of (i) the next 5th April or (ii) 30 days after the event occurs;
4. that the contributions have been made in line with the current annual allowance.
5. that that if I have received pension through flexi access drawdown (or had a payment of an uncrystallised funds pension lump sum) my contribution limits are restricted by the money purchase annual allowance (unless I have been told I am exempt).

Name:
(Printed)

Signature: Date: Day Month Year

Data Protection

We know how important privacy is to you. So we have created a Privacy Notice to provide you with a clear explanation of when, why and how we collect and use your personal data. A version of this notice can be obtained on the Options website at <https://www.optionspensions.co.uk/privacy>



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FOR MORE INFORMATION PLEASE CONTACT

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