

Our SIPP Contribution Form

If you would like a copy of this document in braille, large print or audio format please contact us on 0330 124 1505.

Please complete this contribution form if you wish to make single or regular payments into your SIPP.

If you wish to make regular contributions please complete the standing order mandate form which is available upon request.

Cheques for payment of contributions should be made payable to 'MK SIPP Trustees UK Limited'.

SIPP Member Details

Title	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Member number	<input type="text"/>
Permanent residential address	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
Date of birth	<input type="text"/>
National Insurance Number	<input type="text"/>

Contributions

Any employer contributions are paid to your SIPP gross. This means that the amount of the contribution paid in to your SIPP is the total amount that will be credited to your SIPP. Personal and self-employed contributions are generally paid net of basic rate tax. This means that the amount of contributions paid in to your SIPP will be increased by the amount of basic rate tax we reclaim from HMRC on your behalf. We will reclaim the basic rate tax from HMRC on contributions made by you or on your behalf unless instructed otherwise, providing we have confirmation you are a relevant UK individual who is under 75 years old and have details of your earnings. Tax can only be reclaimed up to relevant UK earnings or £3,600 gross (£2,880 net) if no earnings. If you are taxed above the basic rate you can reclaim the extra tax through your self assessment tax return or contact HMRC. The basic rate tax relief will only be added to your SIPP once HMRC pay the tax relief to us.

Contributions (continued)

Please read the statements below and select the one that applies to you to confirm whether you are eligible for tax relief or whether any limits apply.

I have relevant UK earnings chargeable to income tax or general earnings from overseas crown employment subject to UK tax in this tax year (we will reclaim basic rate tax on personal contributions up to 100% of earnings or maximum personal allowance, whichever is the lower)

I have, or will have been a resident in the UK at some point during this tax year (we will reclaim basic rate tax on personal contributions up to 100% of earnings or maximum personal allowance, whichever is the lower)

My spouse/civil partner has general earnings from overseas crown employment subject to UK tax for this tax year (we will reclaim basic rate tax on personal contributions up to the gross of £3,600)

I am a non-UK resident and have had earnings that were subject to UK tax in one of the last five previous tax years immediately before this year

I, or my spouse/civil partner, are in overseas crown employment but for this tax year do not have relevant UK earnings subject to UK tax (we will not reclaim any tax relief on personal contributions)

None of the above (we will not reclaim any tax relief on personal contributions)

Employer contributions

Single contribution (gross) £

Regular contribution (gross) £

Commencement date

Frequency of regular contribution Monthly

Quarterly

Annually

We will need to confirm the identity of your employer who is making contributions and we may require documentary evidence of their identity. We will contact you if further information is required.

Employer details

Employer's name

Employer's address

Name of contact

Company registered number

Contact telephone number

Contact email address

Personal contributions/Self-employed contributions

Single contribution (net) £

Regular contribution (net) £

Commencement date

Frequency of regular contribution Monthly

Quarterly

Annually

Contributions (continued)

Third party contributions - Individual

Title	<input type="text"/>		
Surname	<input type="text"/>		
Forenames	<input type="text"/>		
Permanent residential address	<input type="text"/>		
Telephone	<input type="text"/>		
Single contribution (net)	£ <input type="text"/>		
Regular contribution (net)	£ <input type="text"/>	Commencement date	<input type="text"/>
Frequency of regular contribution	<input type="radio"/> Monthly	<input type="radio"/> Quarterly	<input type="radio"/> Annually

You will need to provide documentary evidence of the identity of the third party.

Third party contributions - company

Company name	<input type="text"/>		
Companies House number	<input type="text"/>		
Name of contact for company	<input type="text"/>		
Correspondence address	<input type="text"/>		
Telephone	<input type="text"/>		
Email	<input type="text"/>		
Single contribution (net)	£ <input type="text"/>		
Regular contribution (net)	£ <input type="text"/>	Commencement date	<input type="text"/>
Frequency of regular contribution	<input type="radio"/> Monthly	<input type="radio"/> Quarterly	<input type="radio"/> Annually

You will need to provide documentary evidence of the identity of the third party company. Please note that we will only accept cash contributions.

Annual allowance/pension input periods

Each pension input period under the SIPP commences on the first day a contribution is made to the SIPP and ends on the following 5 April. Subsequent pension input periods run from 6 April to 5 April each year.

Important Notes

- Unless contributions are made by cheque drawn on a UK bank or building society, further checks may be required.
- Where regular contributions are made by standing order, payments must be made from a UK bank or building society account in either your name for personal contributions, in your employer's name for employer's contributions or in the name of one of the third parties named above.
- Where contributions are received from a third party we will need to contact the third party for verification purposes, money laundering and data protection purposes.

Data Protection

Options UK Personal Pensions LLP takes your privacy very seriously. We use the personal information collected through this form and any other information that you provide to us and personal information we collect from third parties for the reasons and purposes as set out in our Privacy Notice which is available on our website <https://www.optionspensions.co.uk/privacy>. Alternatively, please call us on 0330 124 1505 or email us at enquiries@optionspensions.com to request a copy is sent to you.

Declaration

- I confirm that the total contributions to any registered pension schemes in respect of which I am entitled to tax relief will not exceed the higher of (i) the basic amount (currently £3,600) or (ii) 100% of my relevant UK earnings (within the meaning of section 189 of the Finance Act 2004) for that tax year;
- I 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;
- I also confirm that, if I intend making contributions that are not to benefit from tax relief (for example 'excess' contributions), I will inform Options UK Personal Pensions LLP in writing;
- I understand that by signing this contribution form I am declaring that I am aware of my annual allowance (including any carry forward) and request that the scheme administrator reclaims tax on my contributions unless I instruct otherwise;
- To the best of my knowledge, the particulars including my basic personal information and declarations made in this form are correct and complete.

Member Signature

Date

Please return your completed and signed contribution form to:

Options UK Personal Pensions LLP, 1st Floor Lakeside House, Shirwell Crescent, Furzton Lake, Milton Keynes, Buckinghamshire, MK4 1GA.



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FOR MORE INFORMATION PLEASE CONTACT
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