Self Managed Investment Request Form

Please complete this form if you wish to manage your own investment portfolio/funds.

I request London & Colonial Services Limited ("London & Colonial") as Trustees of my SIPP to open an account with one of the following Investment Providers:

Please select: RateSetter ☐
Stocktrade ☐

I confirm that I have received and read the following (please tick)

i. Permitted Investments List ☐
ii. Permitted Investments Guidance Notes ☐
iii. Permitted Investments Explanatory Notes ☐
iv. SIPP Member Trading Agreement ☐

These documents are available via www.londoncolonial.com/downloads/simple-investment-sipp

I understand that London & Colonial will invest the maximum available (subject to liquidity requirements)* with my chosen Investment Provider.

All investment payments to UK Investment Providers will be made by BACS transfer. If you require same day payment by CHAPS, please tick the following box ☐
All payments by CHAPS will incur an additional bank payment charge, please refer to our current Schedule of Fees for current banking charges.

Member Signature

Member Full Name

Member Number

Date D D M M Y Y Y Y

Contact number

(Should we need to contact you in relation to this form)

Next Steps Checklist:

☐ Sign and return this form
☐ Sign and return the SIPP Member Trading Agreement

Please return signed and completed forms to:

London & Colonial, 38 – 42 Perrymount Road, Haywards Heath, West Sussex RH16 3DN

*For RateSetter investments the trustees will retain the equivalent of 4 years fees in your HSBC SIPP account.

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