Fidelity INTERNATIONAL

Personal Investing

The Fidelity SIPP - Allowance charge form

to request payment of an annual allowance charge from your Fidelity SIPP

Use this form to pay the annual allowance charge if you have exceeded the annual allowance and the liability for the tax year indicated exceeds £2000. If you wish to carry forward contributions, please refer to the tax relief factsheet on our website at **fidelity.co.uk/sippinfo**. **When completed, please return to Fidelity, PO Box 391, Tadworth, KT20 9FU.**

1 About you

1.1 Your details

1.1.1 Title

☐ Mr ☐ Mrs ☐ Ms ☐ Other:

1.1.2 Surname

1.1.3 First and other names in full

1.1.4 Phone number (in case of query)

1.1.5 Email

1.1.6 Your address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

1.1.7 What is your Fidelity SIPP account number?

1.1.8 Which tax year does the annual allowance charge liability relate to?
(this is the tax year in which the relevant pension input period ended)

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1.1.9 What is the amount of the annual allowance charge to be paid by the Plan on your behalf for the above tax year?

£ .

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2 Your form summary

2.1 Declarations

I understand that:

- The information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.
- The tax charge will be deducted from my cash holding (where available) and then my largest holding.
- My rights in the Plan will be adjusted to take account of the amount of the tax that will be paid on my behalf.
- I cannot withdraw this notice.

I declare that:

- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- The amount of tax I want the Plan to pay has been calculated at the proper rate.
- My total annual allowance charge liability for the tax year indicated exceeds £2,000.
- I have no intention of taking all my benefits under the Plan in the current tax year.
- I authorise Fidelity to deduct the annual allowance charge specified above from my account.

Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

Signature

Date signed

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