

The Fidelity SIPP

Top up form for third parties making additional contributions to your SIPP

Use this form to:

- allow a third party to set up a Regular Savings plan into your Fidelity SIPP
- allow a third party to make single contribution(s) to your Fidelity SIPP

Don't use this form if:

- you haven't yet opened your Fidelity SIPP
- either you or your employer are making contributions to your Fidelity SIPP
- you want to amend a Regular Savings Plan you already have on your Fidelity SIPP

Before you fill in this form:

- make sure you read the important documents shown in the box to the right.

How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this:
- if you make a mistake, please correct it but don't use correction fluid.

Checklist

- Check that you have answered all the relevant questions
- If a single contribution is being made by cheque, remember to attach the cheque(s) as per section 3.
- If regular contributions are being made, remember to complete and sign the Direct Debit Instruction(s) in section 3.
- Please ensure that this cheque payment is separate to other payments that are made to us. Building Society and Bank Draft payments must bear a reference to confirm that this is the spouse/civil partner or any other third party's money. Please ensure their name is clearly added by the issuing bank only, on the face of the cheque
- Read and sign the Declaration in section 5.

What's next?



Remove the Direct Debit Guarantee, then send your completed form to:

Fidelity Personal Investing
PO Box 80
Tonbridge
TN11 9FF

We will write to confirm when we have set up your Regular Savings Plan and/or invested your additional contributions.



Further information on [fidelity.co.uk](https://www.fidelity.co.uk)

You should read these documents before completing this form. You will find them at [fidelity.co.uk/sippinfo](https://www.fidelity.co.uk/sippinfo)

- Key Features Document – this summarises everything you need to know about the Fidelity SIPP
- When choosing your funds make sure you read the Fund Specific Information and/or Key Investor Information Document (KIID) which sets out key information about the fund including the objectives and risks, what it invests in and its charges.

Want to talk to us?

Freephone **0800 358 7480**

Mon-Sat 9am-6pm

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 Employment status

Employed Self-employed Unemployed Full-time education
 Pensioner Caring for children under 16 Other - please specify below.

1.1.5 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

No Yes -

1.1.6 Phone number (in case of query)

1.1.7 Email

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

House number/name

Street, city, county and country

 Postcode

1.1.9 What is your Fidelity SIPP account number?

2 About the spouse/civil partner or other third party

2.1 Their details

2.1.1 Title

Mr Mrs Ms Other:

2.1.2 Surname

2.1.3 First and other names in full

2.1.4 Gender

Male Female

2.1.5 Date of Birth

2.1.6 Their address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode



Instruction to your bank or building society to pay by Direct Debit

Please fill in the whole form using a ball point pen and send to:

Fidelity Personal Investing
PO Box 80
Tonbridge
TN11 9FF

Service User Number

4	3	9	2	4	1
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Name(s) of account holder(s)

Reference

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Instruction to your bank or building society

Please pay Financial Administration Services Ltd Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Financial Administration Services Ltd and, if so, details will be passed electronically to my bank/building society.

Bank/building society account number

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Branch sort code

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Signature(s)
Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

DDI2

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4 Your investment choices

4.1 About investing your contributions

We will follow your investment instructions below but where we cannot achieve this we will place your money in the SIPP Cash Account and contact you.

Need help choosing funds? We've developed a range of easy options to help you choose funds to put in your Fidelity SIPP. Take a look at the guidance section of our website at [fidelity.co.uk](https://www.fidelity.co.uk)

Please ensure you include the fund code as your fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at [fidelity.co.uk](https://www.fidelity.co.uk)

Fund code	Fund name	Single contribution	Regular contribution
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
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<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
Amount to be invested in the SIPP Cash Account		<input type="text"/> %	<input type="text"/> %
Totals should add up to 100%		100 %	100 %

5 Your application summary

5.1 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.

I declare that:

- I have been provided with and read the Fidelity SIPP Terms and Conditions, Fidelity SIPP Key Features Document and Key Investor Information Documents (KIID) and/or Fund Specific Information.
- 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.
- If contributions are to be paid:
 - a) I am under age 75 and a relevant UK individual under Section 189 of Finance Act 2004 and not a US person
 - b) The total of the member contributions paid to my Fidelity SIPP and to other registered pension schemes, on which I am entitled to tax relief, under Section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
 - The basic amount (currently £3,600 gross); or
 - 100% of my relevant UK earnings (as defined in Section 189 of Finance Act 2004 in the tax year);
 - c) the declaration in b) is correct, to the best of my knowledge and belief;
 - d) I will give notice to the Scheme Administrator if an event occurs, as a result of which I will no longer be entitled to relief on my contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
 - end of the tax year in which the event occurs; and
 - 30 days of the event
- I confirm that I have not received advice from Fidelity in connection with this Regular Savings Plan set-up and/or SIPP top-up.

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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The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, Financial Administration Services Ltd will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request Financial Administration Services Ltd to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Financial Administration Services Ltd or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society - If you receive a refund you are not entitled to, you must pay it back when Financial Administration Services Ltd asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.