

Additional contribution form

This is an application form to pay a first or additional, one-off contribution to your SIPP.

If you are a legal guardian applying on behalf of a member under the age of 18, then please complete this form on behalf of the member and sign the declaration. We cannot process your contribution until this form is completed and signed.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at enquiry@youinvest.co.uk.

Once completed and signed please return the form to us at the address below.

AJ Bell Youinvest
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Checklist

If the payment is by cheque, then please ensure that you include the following when you return this form to us.

Member contribution cheque

Employer contribution cheque

Important notes

1. All cheques must be made payable to 'AJ Bell Youinvest SIPP re (your name)' e.g. AJ Bell Youinvest SIPP re John Smith.
2. Your contribution must be paid by cheque drawn on a UK bank or building society account in your name (or in joint names with someone else).
3. Where an employer intends to make a single contribution, it must be paid by cheque drawn on a UK bank or building society account in the employer's name.

Personal details

Your personal details

Title

Surname

Forename(s)

Date of birth

National Insurance number

Account number

Permanent residential address

Postcode

Country

Telephone number

Email address

Approximate annual earnings

Marital status

Legal guardian's details

Only complete this section if the member is under the age of 18.

Title

Surname

Forename(s)

Date of birth

National Insurance number

Permanent residential address

Postcode

Country

Telephone number

Email address

Note: If you are applying as legal guardian on behalf of a member under age 18, we will send all correspondence to you and not the member.

Contributions

The single contribution to be paid to your SIPP is:

The contribution is being made by

Member (net)

Employer (gross)

Employer contribution

Your employer's details are:

Employer's name

Registered office address

Postcode

Is the employer listed on a recognised stock exchange?

Yes

No

Member contributions are contributions paid by the member personally, or by someone else on the member's behalf, e.g. parent, grandparent or spouse. They do not include employer contributions.

All member contributions are payable net of basic rate tax (20% for the 2020/21 tax year). We will reclaim basic rate tax from HM Revenue & Customs (HMRC) and credit it to the SIPP cash account. If you pay tax at a higher rate than basic rate you can claim any further tax relief to which you are entitled via self-assessment. Please note that if you are not the customer named on the form but are paying a contribution on their behalf you will not be entitled to claim any further tax relief.

All employer contributions are payable gross. Single contributions must be paid by a cheque drawn on a UK bank or building society account in the employer's name.

Declaration

I declare that to the best of my knowledge and belief the details provided in this form are correct, complete and not misleading and that the information provided in the application for my SIPP is still valid, except for any changes specifically advised to AJ Bell Youinvest.

I further declare that:

1. I (or the member if this declaration is being made by a parent or legal guardian) am under age 75 and am a relevant UK individual under Section 189 of Finance Act 2004;
2. the total of the member contributions paid to this scheme and to other registered pension schemes, on which I (or the member, if this declaration is being made by a parent or legal guardian) am entitled to tax relief, under section 188 of the Finance Act 2004, will not exceed, in any tax year, the higher of:
 - a. the basic amount (£3,600 gross for the 2020/21 tax year); or
 - b. 100% of my (or the members if this declaration is being made by a parent or legal guardian) relevant UK earnings as defined in Section 189 of Finance Act 2004 in that tax year.
3. The declaration in 2. is correct to the best of my knowledge and belief;

4. I will give notice to the scheme administrator if an event occurs as a result of which I (or the member if this declaration is being made by a parent or legal guardian) will no longer be entitled to relief on member contributions, under section 188 of Finance Act 2004, I will give notice by the later of –
- a. 5th April in the year of assessment in which the event occurs and
 - b. The date which is 30 days after the occurrence of that event.

If the member is under 18 the parent or legal guardian must sign.

Name

Date

Signature