

Supplementary Contributions Application Form

All sections should be completed if you'd like to make a contribution to your SIPP.

Your details

First name(s) in full	<input type="text"/>	Last name	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/>	National Insurance number	<input type="text"/>
Client number	<input type="text"/>		

Entitlement to tax relief

If the following information isn't provided at the outset with the contribution payment then we're unable to reclaim tax relief.

Please indicate the most relevant to you:

- | | | | |
|---|-----------------------|--|-----------------------|
| <p>1. I have relevant UK earnings chargeable to income tax, or general earnings from overseas Crown employment subject to UK tax, in this tax year.</p> | <input type="radio"/> | <p>4. I, or my spouse, am in overseas Crown employment but for this tax year don't have general earnings from overseas Crown employment subject to UK tax.</p> | <input type="radio"/> |
| <p>2. I have, or will have, been resident in the UK at some time during this tax year.</p> | <input type="radio"/> | <p>5. As at the date of this application I have been resident in the UK at some point during the five tax years immediately before this tax year.</p> | <input type="radio"/> |
| <p>3. My spouse has, for this tax year, general earnings from overseas Crown employment subject to UK tax.</p> | <input type="radio"/> | | |

If you ticked option one, we'll reclaim basic tax rate on your personal contributions. If you ticked any of the other options, we'll reclaim basic rate tax on your personal contributions up to £3,600 gross. If you're unable to tick any of these boxes, we won't reclaim any basic rate tax relief on your personal contributions.

Personal contributions

Single contribution (£) (gross)*

Regular contribution (£) (gross)*

Please indicate as appropriate.
I wish to pay for my contribution:

From my Wealthtime Select General Investment Account cash balance.

From my Wealthtime Select ISA account cash balance.

By bank transfer to Wealthtime Select.

Frequency of regular contributions
 Monthly Quarterly
 Half-yearly Yearly

Start date for regular contribution payments: (dd/mm/yyyy)

or

*You only need to pay the net (of basic rate tax) amount.

If you want to make regular contribution payments to your SIPP, please forward a completed Direct Debit mandate to us – a copy is available in the literature library at wealthtime.com Please allow **15 working days** for us to set this up.

If personal contributions are paid net of basic rate tax, Wealthtime Select will reclaim this tax. The tax reclaim will take between 7 and 11 weeks. Please note that the value of the reclaim can only be invested once it's been paid into your SIPP bank account and has cleared.

Third-party contributions

A third party may make a contribution on your behalf to your SIPP. If a third party (other than your employer) is to make contributions to your SIPP, please provide their details below. We will need to carry out anti-money laundering identification checks on the third party before contributions can be accepted.

Third-party details

Mr Mrs Ms Miss Other If 'other', please state

First name(s) Address

Last name

Date of birth (dd/mm/yyyy)

Postcode

Employer contributions

By providing your employer details below you are authorising Wealthtime Select to correspond directly with your employer.

Employer name	<input type="text"/>	Employer contact name	<input type="text"/>
	<input type="text"/>	Employer address	<input type="text"/>
Country of incorporation/ establishment	<input type="text"/>		<input type="text"/>
Phone number	<input type="text"/>		<input type="text"/>
Employer/company registered number	<input type="text"/>		<input type="text"/>
Nature of business	<input type="text"/>	Postcode	<input type="text"/>

Is your employer contribution from an unincorporated business? Yes No

If 'yes', you'll need to supply evidence of its identity.

Acceptable evidence

A photocopy of their latest annual report and accounts, plus an HM Revenue & Customs tax return or invoice.

Single contribution

Employer (£) (gross)	<input type="text"/>	Employee (£) (net) (relief at source)	<input type="text"/>
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Record of payments due for regular employer contributions

Employer (£) (gross)	<input type="text"/>	Employee (£) (net) (relief at source)	<input type="text"/>
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If your employer wishes to regularly contribute to your SIPP, please have them complete the record of payments due section below and provide a completed Direct Debit mandate. Please allow **15 working days** for us to set up any Direct Debit instruction.

Frequency of contributions

Monthly Quarterly Half-yearly Yearly

Start date for regular contribution payments: (dd/mm/yyyy) or

We will use this start date as the ongoing collection date for regular contributions. The due date for The Pensions Regulator purposes, in relation to these regular payments, will always be the 19th day of the following month.

To be signed on behalf of the employer

I confirm that the person signing the Direct Debit mandate (DDM) is an authorised signatory on the bank account from which the payments will be deducted, and is authorised by the company/organisation named as the account holder to set up Direct Debits on this account for the benefit of the employee named in this form.

Name of person signing DDM

Employer's authorised signature

Position of person signing DDM

Name of employer's authorised signatory

I acknowledge that Wealthtime Select reserves the right to request proof that the above-named person is an authorised signatory of the company/organisation before the DDM can be set up. I also agree to provide such proof when requested e.g. a certified, authorised signatory list or a letter on company letterhead, signed by a senior director confirming the signatory's authority. I confirm the information provided here is accurate and any changes will be notified in writing.

Position of employer's authorised signatory

Date (dd/mm/yyyy)

Declaration

I confirm that to the best of my knowledge, the information given in this application form is true and complete.

- I will tell Wealthtime Select in writing within 30 days if:
- There's any change in my residency status.
 - There's any change in my name or permanent residential address.

I understand this application determines whether I'm entitled to basic rate tax relief at source on my contributions.

- I agree that the total contributions to any registered pension schemes, where I am entitled to tax relief, will not exceed the higher of:
- £3,600, or
 - My relevant UK earnings for the tax year, subject to a maximum contribution of the current annual allowance plus any carry forward entitlement I may have (see notes).

If I'm no longer entitled to tax relief on my contributions, I will let Wealthtime Select know in writing:

- Before 5 April in the year of assessment in which this occurs, or
- Within 30 days of this change.

I will let Wealthtime Select know if I have taken or will take flexi-access drawdown benefits.

I understand it's a serious offence to make false statements and that the penalties are severe and could lead to prosecution.

Please note: if this application is also to be used as an application for tax relief at source, it's a serious offence to make false statements. The penalties are severe and could lead to prosecution.

Your signature

Date (dd/mm/yyyy)

Notes

Contributions

- Your total contribution must not exceed your annual allowance (£40,000 from 2014/15) plus any entitlement you may have available from previous tax years. We're required to let you know, by issuing a pension statement to you, if we think you've contributed more than this amount. If you have, you and your SIPP will be liable for a tax charge known as an annual allowance charge. The excess that you've contributed will also be added to your total income, and any tax will be charged at your marginal rate. A tapered annual allowance may apply if your 'threshold income' or 'adjusted income' exceeds £200,000 and £240,000 p.a. respectively. Please ask your financial adviser for the definition of 'threshold income' and 'adjusted income'.
- Carry-forward provisions are complex and you should ask your financial adviser about them, but essentially it means you can carry forward £40,000 from each of the previous three years (less any contributions you made during those years, starting with the earliest year), providing you've been a member of a pension scheme during those three years.
- The ability to make contributions is also reduced if you've taken any income under the flexi-access drawdown rules (savings to a defined benefit pension scheme are also taken into account). This money purchase annual allowance is currently £4,000 per annum.
- All personal contributions are payable net of basic rate tax (20% for the current tax year). We will reclaim basic rate tax from HM Revenue & Customs and credit it to your SIPP product account. If you're a higher rate taxpayer, the difference between higher rate and basic rate tax can be reclaimed via self-assessment.
- All employer contributions are payable gross.

If you require this document in an alternative format please contact us.

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