

# Halifax Share Dealing SIPP

## Additional Contribution Form



This is an application form to pay an additional one-off contribution or establish a regular monthly contribution by Direct Debit. If you wish to vary your existing regular contribution Direct Debit arrangements, then please write to us with details of the changes and do not complete this form.

If you are a legal guardian applying on behalf of a member under the age of 18, please complete this form on behalf of the member and sign the declaration in Section 3.

We cannot process your contribution until we receive this form 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 **03457 22 55 25** or by e-mail at **hdsipp@sippdeal.co.uk**.

### Checklist

Please ensure the following documents accompany this form when returning it to AJ Bell Management Limited.

|                                | Yes                      | N/A                      |                         | Yes                      | N/A                      |
|--------------------------------|--------------------------|--------------------------|-------------------------|--------------------------|--------------------------|
| Contribution cheque (member)   | <input type="checkbox"/> | <input type="checkbox"/> | Direct Debit (member)   | <input type="checkbox"/> | <input type="checkbox"/> |
| Contribution cheque (employer) | <input type="checkbox"/> | <input type="checkbox"/> | Direct Debit (employer) | <input type="checkbox"/> | <input type="checkbox"/> |
|                                |                          |                          | - see important note 3  |                          |                          |

### Important notes

- All cheques must be made payable to 'Sippdeal Trustees Limited re (Your name)'.  
• Unless member contributions are made by cheque drawn on a UK bank or building society account, further checks may be required.  
• Where an employer intends to pay regular contributions by direct debit, payments **MUST** be made from a UK bank or building society account in the employer's name. Single contributions paid by an employer must also be paid by cheque drawn on a UK bank or building society account in the employer's name.

### 1. Personal details Member's personal details

Title (Mr/Mrs/Miss/Ms/Dr/other)

Surname

Forename(s)

National Insurance number (not required if the applicant is under 16)

Permanent residential address

Town

County Post code

Home number

Work number

Mobile number

Home email

Work email

Marital status (Single/married/civil partner/divorced/widowed/other)

Approximate annual earnings (if applicable)

Your SIPP reference (if known)

## 1. Personal details Legal guardian's details - only complete this section if the member is under the age of 18.

Title (Mr/Mrs/Miss/Ms/Dr/other)

Surname

Forename(s)

Permanent residential address

Town

County

Post code

Home number

Work number

Mobile number

Home email

Work email

Marital status (Single/married/civil partner/divorced/widowed/other)

## 2. Contributions

Please indicate the amount of contributions to be paid to your SIPP

### Single Contribution

Member (net)

Employer (gross)

Is the member's contribution to be paid in the form of a direct transfer of shares from a Share Save maturity?

Yes

No

If Yes, the amount of the net contribution shown above should be the estimated market value of the shares to be transferred. If the actual market value of the shares at the date of the transfer is different to the amount shown your net contribution will be amended to the actual market value.

### Regular Contribution

Member (net)

per month

Employer (gross)

per month

### Member Contribution

Please tick one or more of the following boxes to indicate from which source member contributions are to be funded

Income from employment

Property sale

Investment/savings

Divorce settlement

Inheritance

Other (please specify)

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

All member contributions are payable net of basic rate tax (20% for the 2019/20 tax year). We will reclaim basic rate tax from HM Revenue & Customs (HMRC) and credit it to your SIPP. 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. If you are a Scottish or Welsh taxpayer and you pay tax at a rate higher than basic rate, you will be entitled to claim further tax relief at that higher rate. If you pay tax at lower than the basic rate of tax you will still be entitled to receive tax relief at the basic rate. Please note that if you are not the member 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. Where an employer intends to pay regular contributions by Direct Debit, the first payment MUST be made by a cheque drawn on a UK bank or building society account in the employer's name. Single contributions must also be paid by cheque drawn on a UK bank or building society account in the employer's name.

If your employer is to pay contributions on your behalf, please advise your employer's name, registered office address and post code.

Employer's name

Permanent residential address

Town

County Post code

Is the employer listed on a recognised stock exchange?

Yes  No

### 3. Declarations

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 the Halifax Share Dealing SIPP Administration Team.

I further declare that:

- a) 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;
- b) 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 Finance Act 2004, will not exceed, in any tax year, the higher of:
  - i) the basic amount (£3,600 gross for the 2019/20 tax year); or
  - ii) 100% (or the member's if this declaration is being made by a parent or legal guardian) of my relevant UK earnings as defined in Section 189 of Finance Act 2004 in that 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 (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 this notice by the later of:
  - i) 5th April in the year of assessment in which the event occurs; and
  - ii) the date which is 30 days after the occurrence of that event.

Please sign and date the application (if the member is under 18 the parent or legal guardian must sign) and return it to:-

The Halifax Share Dealing SIPP Administration Team  
AJ Bell Management Limited  
4 Exchange Quay  
Salford Quays  
Manchester  
M5 3EE

Tel: 03457 22 55 25

Fax: 0345 54 32 601

Name

Date

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|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|

Signature

AJ Bell Management Limited is the Scheme Administrator of the Halifax Share Dealing SIPP. AJ Bell Management Limited is registered in England No. 3948391. Registered Office: 4 Exchange Quay, Salford Quays, Manchester M5 3EE. Authorised and regulated by the Financial Conduct Authority and on the FCA register under FCA register number 211468. Sippdeal Trustees Limited is a wholly owned subsidiary of AJ Bell Management Limited, registered in England No. 4050222. Registered Office: 4 Exchange Quay, Salford Quays, Manchester M5 3EE. Sippdeal Trustees Limited does not conduct any regulated activities, and is, therefore, not regulated.

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