

# The Best SIPP Additional Contribution Form

Please use this form to:

- top-up an existing Bestinvest SIPP with an additional contribution by cheque or bank transfer
- start making regular contributions, or
- amend existing regular contributions into your SIPP.

Please complete in **BLOCK CAPITALS**

## 1. Your details

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address (Please note: only UK residents can apply for a Best SIPP)

Postcode

Daytime Telephone Number

Date of Birth

Best SIPP Account Number

Please confirm your current status by ticking one of the following boxes:

Employed

Self-employed

Carer for a person aged 16 or over

Unemployed

Full time education

A child under the age of 16

Pensioner

Carer for a person aged under 16

Other (please specify)

## 2. A Your personal contributions (where applicable)

Single contribution – net amount\*

 net

Please make cheques payable to 'Embark Pensions Trustees Limited'.

Regular contribution – net amount\*

 net per month

(minimum £80)

If investing regularly please set up the standing order with your bank. Payment recipient details are provided within Section 4.

\*The amounts entered should be the net amounts (i.e. less basic rate tax.) For example, if you wish to contribute £3,600 (gross) you should enter £2,880 (net). We will reclaim tax relief on your personal contributions, where applicable (for further details see our Best SIPP Key Features Document).

## 2.B Third party contributions (where applicable)

Single contribution – net amount\*

 net

Regular contribution – net amount\*

 net per month

Please complete this section if a contribution is to be made by a third party, for example a relative.

Title (Mr/Mrs/Miss/Ms/Other)

Surname

First Names (in full)

Permanent Residential Address

Postcode

Date of Birth

If investing regularly please set up the standing order with your bank. Payment recipient details are provided within Section 4.

## 3. Your employer's contributions (where applicable)

Single contribution – gross amount

 gross

Regular contribution – gross amount

 gross per month

Employers Name

Address

Postcode

Please make cheques payable to 'Embark Pensions Trustees Limited'.

If investing regularly please set up the standing order with your bank. Payment recipient details are provided within section 4. (minimum £80)

\*The amount entered should be the net amounts (i.e. less basic rate tax.) For example, if you wish to contribute £3,600 (gross) you should enter £2,880 (net). We will reclaim tax relief on your personal contributions, where applicable (for further details see our Best Key Features Document).

## 4. Bank details

Confirmation Details of the 201 account

Account name: Embark Pensions Trustees Limited

Sort Code: 12-21-39

Account number: 06980201

Reference: BI SIPP number

## 5. Payment date

if payment is to be made electronically

NOTE:

## 6. Declaration & signature

The Best SIPP ("The Scheme") is established as a registered pension scheme as defined in Part 4 of the Finance Act 2004. The Scheme was established by EBS Pensions Limited is the Scheme Administrator and Embark Pensions Trustees Limited is the Scheme Trustee. With this contribution I agree to be bound by the Deed and Rules governing the Scheme as amended from time to time and any of the provisions that may at any time apply to my membership.

I accept no cancellation rights apply to this additional contribution as my SIPP has already been established.

I confirm that I have received the Best SIPP Key Features Document relating to this investment, the Best SIPP Terms & Conditions, the Managed Portfolio Service Terms of Business and the 'Key facts about our service and costs' document; I also confirm that I have been given the opportunity to read these Terms and the Key Facts, and that I have had any questions arising answered satisfactorily. I declare that this form has been completed to the best of my knowledge.

**By signing below I agree to the above declaration**

Name

Date

Once completed, please return this form to: **BestSIPP Administration, Bestinvest, The Observatory, Western Road, Bracknell RG12 1RF**

Bestinvest is a trading name of Evelyn Partners Investment Management Services Limited, which is authorised and regulated by the Financial Conduct Authority. Registered in England at 45 Gresham Street, London EC2V 7BG. No. 02830297.

EBS Pensions Limited (Scheme Administrator) is authorised and regulated by the Financial Conduct Authority (reference number 00998606); registered in England and Wales (company number 00998606); registered office: 100 Cannon Street, London, EC4N 6EU.

Embark Pensions Trustees Limited (Scheme Trustee); registered in England and Wales (company number 06300217); registered office: Dunsar House Deakins Business Park Blackburn Road, Egerton, Bolton, England, BL7 9RP"