

# The Fidelity SIPP

**Junior SIPP switch form** for making changes to the funds in your Junior SIPP. Alternatively you can make a switch by calling us on 0800 358 7480

## Use this form to:

- change the funds being invested in
- move from fund(s) to fund(s)
- move from fund(s) to cash within your account
- move from cash within your account to fund(s)

## Don't use this form if:

- you want to make any other changes to your Fidelity Junior 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
- Check the funds you are switching into total 100%
- Read and sign the Declaration in section 4.

## What's next?



Remove and keep this cover page, then send your completed form to:

**Fidelity Personal Investing**  
**PO Box 80**  
**Tonbridge**  
**TN11 9YA**

We will carry out your switch instructions and send you a confirmation within a few days. You will receive one confirmation for the sale of your funds and another for the purchase of new funds.



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

The following documents govern the Fidelity Junior SIPP and you should read them 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 key information document 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



## 2 About the legal guardian of the Applicant

### 2.1 Your 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 Are they a UK National only? (Please mark an X in the box)

#### 2.1.5 Are they a UK National and National of one or more other countries? (Please mark an X in the box and list all other countries below)

#### 2.1.6 Are they a National of Non-UK countries only? (Please mark an X in the box and list all other countries below)

##### Nationality 1

##### Nationality 2

##### Nationality 3

##### Nationality 4

#### 2.1.7 Phone number (in case of query)

#### 2.1.8 Email

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

House number/name

Street, city, county and country

Postcode

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### 3 Investment choices

#### 3.1 Switch instructions

This form is for switching funds and cash only. Should you wish to change your exchange traded investments please use our online service at [fidelity.co.uk](http://fidelity.co.uk). To perform a switch please use the 'Switch from' section to let us know which of your funds you wish to sell and the percentage of each to be sold. For example, to switch entirely out of a fund please enter 100% for that fund. If you specify 40%, then we will sell 40% of your current holding. You must then use the 'Switch to' section to let us know how to invest the proceeds. For example to invest half of the proceeds into a specific fund, enter the fund details and 50%. You may specify some or all of the cash within your account to be included in the switch. Fund manager buy and sell charges may apply.

We will follow your investment instructions below, but where we cannot achieve this we will hold your money as cash within your account. This form is for investing into funds and cash only. Should you wish to invest in exchange traded investments, then please specify cash at this point. Then you can use our online service at [fidelity.co.uk](http://fidelity.co.uk) to make your investment later.

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

Please ensure you include the fund code as the 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](http://fidelity.co.uk)

Should any of your new funds pay income, we will follow your existing preferences for income payments on your account.

#### Switch from:

Fund code	Fund name	Percentage of existing holding to be switched
<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"/> %
		Cash within my account <input type="text"/> %

#### Switch to:

Fund code	Fund name	Percentage of existing holding to be switched
<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"/> %
		Cash within my account <input type="text"/> %
<b>Totals should add up to 100%</b>		<b>100</b> %

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## 4 Application summary

### 4.1 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 am the legal guardian of the Applicant; and the Applicant is under 18 years of age.
- I have been provided with and read the Fidelity SIPP Terms and Conditions, Key Features Document and key information documents relevant to the chosen fund(s)..
- 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.
- I confirm that I have not received advice from Fidelity in connection with this switch.

### Signature of legal guardian of the Applicant

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

#### Signature

	
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Date signed

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