

The Fidelity SIPP

Application to set-up or amend regular payments to your Fidelity SIPP

Use this form to:

- change the amount you are paying into your Fidelity SIPP
- change the fund selection for your future regular contributions
- change the bank account from which payments are taken
- change the date on which payments are taken from your bank account.
- set up a regular savings plan (minimum £50 per month)

Don't use this form if:

- you want to make single contributions to your plan

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
- Complete and sign the Direct Debit Instruction on page 4
- Read and sign the Declaration on page 6
- If you are adding or amending an employer regular payment, please ensure a new 'record of payments due' form is completed by your employer and sent into us. This can be found online at <https://www.fidelity.co.uk/investor/help/forms-literature/forms.page>

What's next?



Remove and keep the Direct Debit Guarantee, then send your completed form to:

Fidelity Personal Investing
PO Box 80
Tonbridge
TN11 9FF

We will write to confirm when we have made changes to your Regular Savings Plan.



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

You should read these documents 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 to Fri 8am to 6pm

Sat 9am to 6pm

1 About you

1.1 Your details

1.1.1 Title

Mr Mrs Ms Other:

1.1.2 Surname

1.1.3 First and other names in full

1.1.4 Gender

Male Female

1.1.5 Date of birth (DDMMYYYY)

Town of birth

1.1.6 Country of birth

1.1.7 Employment status

Employed Self-employed Unemployed Full-time education
 Pensioner Caring for children under 16 Other - please specify below.

1.1.8 Source of this investment

Income from salary Divorce Settlement Sale of Property Inheritance
 Gift Sale of Investment/transfer Savings from income

Other - please specify:

1.1.9 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

No Yes -

1.1.10 Are you a UK National only? (Please mark an X in the box)

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

1.1.12 Are you 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 Contributions

2.1 Your regular contributions

We provide up to three regular contributions per account: one from yourself, one from your employer and another from a third party of your choosing. Any further instruction over and above this limit will be used to replace the existing regular contribution of that type.

2.1.1 Do you want to make or amend your regular contributions?

No
 Yes - what is the regular amount you want to pay into your plan? £ •

When making an amendment, this will replace your existing regular contribution collection.

2.1.2 When would you like your regular contributions be taken from your bank account?

10th **OR** 25th

Please allow twelve working days for us to set up your Regular Savings Plan. Collections will then start on the next available payment date and follow the frequency you have selected.

2.1.3 How often would you like payments to contribute?

Monthly Quarterly Every 6 Months Annually

2.1.4 Do you want to change the bank account from which the regular monthly contributions are taken?

For all New Instructions or changes to your bank details please complete the Direct Debit Instruction on page 5 ▶

No
 Yes - what is the amount you want to pay into your plan? £ •

2.2 Employer Contributions

2.2.1 Does your employer want to make or amend an employer contribution?

No
 Yes - what is the regular amount you want to pay into your plan? £ •

When making an amendment, this will replace your existing regular contribution collection.

2.2.2 When would they like their regular contributions be taken from their bank account?

10th **OR** 25th

Please allow twelve working days for us to set up your Regular Savings Plan. Collections will then start on the next available payment date and follow the frequency you have selected.

2.2.3 How often would they like to make a payment?

Monthly Quarterly Every 6 Months Annually

2.2.4 Employer's Name

2.2.5 Employer's registered address. 'Care of' and PO Box are not acceptable.

Building number/name

Street, city, county and country

 Postcode

2 Contributions (continued)

2.2.6 Company Registration number

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Important: If your employer is not registered with Companies House, we will require further documents. Please ask your employer to complete both the direct debit instructions in this form, along with an 'Employer Record of Payments Due Form' (see checklist on front page).

2.3 Spouse/civil partner or other third Party

2.3.1 Title

Mr
 Mrs
 Ms
 Other:

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2.3.2 Surname

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2.3.3 First and other names in full

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2.3.4 Gender

Male
 Female

2.3.5 Date of birth (DDMMYYYY)

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Town of birth

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2.3.6 Country of birth

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2.3.7 Employment status

Employed
 Self-employed
 Unemployed
 Full-time education
 Pensioner
 Caring for children under 16
 Other - please specify below.

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2.3.8 Driving Licence number (if applicable - 18 characters as shown on your photocard)

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2.3.9 Their address. 'Care of' and PO Box are not acceptable.

House number/name

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Street, city, county and country

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Postcode

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2.3.10 Does your spouse/civil partner or other third party want to make or amend a regular contribution?

No
 Yes - what is the regular amount? £

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2 Contributions (continued)

2.3.11 Source of this investment

Income from salary
 Divorce Settlement
 Sale of Property
 Inheritance

Gift
 Sale of Investment/transfer
 Savings from income

Other - please specify:

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2.3.12 When would they like their regular contributions to be taken from their bank account?

10th **OR** 25th

Please allow twelve working days for us to set up your Regular Savings Plan.
 Collections will then start on the next available payment date and follow the frequency you have selected.

2.3.13 How often would they like to make a payment?

Monthly
 Quarterly
 Every 6 Months
 Annually

We are currently changing our administration system. Please ask the spouse/civil partner or other third party to complete both Direct Debit Instruction on the next page. We will then set up your regular contribution using only those details necessary to complete your instruction. ►

We are currently changing our administration system. Please ask the spouse/civil partner or other third party to complete both Direct Debit Instruction on this page. We will then set up your regular contribution using only those details necessary to complete your instruction.



Instruction to your bank or building society to pay by Direct Debit



Please fill in the whole form using a ballpoint pen and send to: Fidelity Personal Investing, PO Box 80, Tonbridge, TN11 9YA.

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Service User Number

4	3	9	2	4	1
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Reference

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Name(s) of account holder(s)

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Instruction to your bank or building society

Please pay Financial Administration Services Ltd. Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Financial Administration Services Ltd and, if so, details will be passed electronically to my bank/building society.

Bank/building society account number

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Branch sort code

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Signature(s)
Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

DD12

FILSIPPRSPAmendInt /01.19/v9.0/



Instruction to your bank or building society to pay by Direct Debit



Please fill in the whole form using a ballpoint pen and send to: Fidelity Personal Investing, PO Box 80, Tonbridge, TN11 9YA.

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Service User Number

4	4	9	7	0	6
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Reference

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Name(s) of account holder(s)

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Instruction to your bank or building society

Please pay FIL SIPP Trustee (UK) Limited. Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with FIL SIPP Trustee (UK) Limited and, if so, details will be passed electronically to my bank/building society.

Bank/building society account number

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Branch sort code

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Signature(s)
Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

DD12

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3 Your investment choices

3.1 Investing your contributions

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 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 your Fidelity SIPP. Take a look at the guidance section of our website at fidelity.co.uk

Please ensure you include the fund code as your 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. When you amend a regular contribution we also use your investment choices below to invest any other existing regular contributions to this account.

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

Fund code	Fund name	Regular contribution
<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"/> %
<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"/> %
Amount to be paid into cash within my account		<input type="text"/> %
Totals should add up to 100%		<input type="text"/> 100 %

/01.19/v9.0/

FILSIPPRSPAmendInt

4 Your 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 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 Regular Savings Plan.

Your signature

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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The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, Financial Administration Services Ltd will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request Financial Administration Services Ltd to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Financial Administration Services Ltd or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – If you receive a refund you are not entitled to, you must pay it back when Financial Administration Services Ltd asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, FIL SIPP Trustee (UK) Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request FIL SIPP Trustee (UK) Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by FIL SIPP Trustee (UK) Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – If you receive a refund you are not entitled to, you must pay it back when FIL SIPP Trustee (UK) Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.