

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:

- if you don't have an existing SIPP account
- you want to make single contributions to your plan
- you want to set up or amend regular payments to a 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
- Complete and sign the Direct Debit Instruction on page 6
- Read and sign the Declaration on page 8
- 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 9YA

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**

1 About you

1.1 Your details

1.1.1 Title

Mr Mrs Ms Other: [grid]

1.1.2 Surname

[grid]

1.1.3 First and other names in full

[grid]

1.1.4 Date of birth (DDMMYYYY)

[grid]

Town of birth

[grid]

1.1.5 Country of birth

[grid]

1.1.6 Employment status

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

[grid]

1.1.7 Source of this investment

Income from salary Divorce Settlement Sale of Property Inheritance Gift Sale of Investment/transfer Savings from income Other - please specify: [grid]

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

No Yes - [grid]

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

[checkbox]

1.1.10 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)

[checkbox]

1.1.11 Are you a National of Non-UK countries only?

(Please mark an X in the box and list all other countries below)

[checkbox]

Nationality 1

[grid]

Nationality 2

[grid]

Nationality 3

[grid]

Nationality 4

[grid]

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

[grid]

1 About you

1.1.13 Phone numbers

Home

Mobile

1.1.14 Email

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

House number/name

Street, city, county and country

Postcode

1.1.16 What is your Fidelity SIPP account number?

Either you, your employer, or the third party, should complete the Direct Debit Instruction below.



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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Name(s) of account holder(s)

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Reference

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Bank/building society account number

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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.

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

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"/> %
<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" value="1"/> <input type="text" value="0"/> <input type="text" value="0"/> %

/11.19/v11.0/

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 latest version of the Key Features Document
 - Doing Business with Fidelity incorporating the Fidelity Client Terms
 - the 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



Date signed

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Important: A Direct Debit Guarantee should be retained by the relevant payer.

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.