

The Fidelity SIPP

Cash top up form for employers making additional cash contributions to your SIPP.

Use this form to:

- allow an employer to make a single cash contribution to your Fidelity SIPP.

Don't use this form if:

- you haven't yet opened your Fidelity SIPP
- either you, your spouse/civil partner or other third party is making contributions to your Fidelity SIPP
- you want to set up or amend a Regular Savings Plan you already have on your Fidelity 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
- If your top up is being made by cheque, please attach a cheque from your employer as per section 2.
- Read and sign the Declaration in section 4.

What's next?



Please send your completed form to:

Fidelity Personal Investing
PO Box 80
Tonbridge
TN11 9FF

We will write to confirm when we have invested your additional contributions.



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

You should read the Key Features Document before completing this form - this summarises everything that you need to know about the Fidelity SIPP. You will find it at [fidelity.co.uk/sippinfo](https://www.fidelity.co.uk/sippinfo)

Want to talk to us?

Freephone **0800 358 7480**

Mon-Fri 8am-6pm and Sat 9am-6pm

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 Employment status

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

[grid]

1.1.5 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]

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

[checkbox]

1.1.7 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]

1.1.8 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]

1.1.9 Phone number (in case of query)

[grid]

1.1.10 Email

[grid]

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

House number/name

[grid]

Street, city, county and country

[grid]

[grid]

[grid]

Postcode

[grid]

1.1.12 What is your Fidelity SIPP account number?

[grid]

For office use only

PEN [checkbox]

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.
- If contributions are to be paid:
 - a) I am under age 75 and a relevant UK individual under Section 189 of Finance Act 2004 and not a US person
 - b) The total of the member contributions paid to my Fidelity SIPP and to other registered pension schemes, on which I am entitled to tax relief, under Section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
 - The basic amount (currently £3,600 gross); or
 - 100% of my relevant UK earnings (as defined in Section 189 of Finance Act 2004 in the 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 will no longer be entitled to relief on my contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
 - end of the tax year in which the event occurs; and
 - 30 days of the event
- I confirm that I have not received advice from Fidelity in connection with this SIPP top-up.

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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