

The Fidelity SIPP Income amendment form

Please complete the form in BLOCK CAPITALS using black ink. Use this form to set up or amend regular income payments or to take a one off income payment from your income drawdown account. If you have more than one income drawdown account please complete a separate form for each account. Please return the form to Fidelity Personal Investing, PO Box 80, Tonbridge, TN11 9YA

1 Personal details

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 Date of birth (DDMMYYYY) Town of Birth

1.1.5 Country of birth

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

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)

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)

Nationality 1

Nationality 2

Nationality 3

Nationality 4

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 What is your Fidelity SIPP account number?

/12.18/v8.0/

FILSIPPIncomeInt

2 One-off income payment request

2.1 Your income details

2.1.1 How much gross income would you like to withdraw from this drawdown account?

Maximum available - only applicable to Capped Drawdown.

Specified amount £ .

Total remaining account value

Note: If there is insufficient cash to make this payment, we will disinvest proportionately from your portfolio to meet any shortfall. If you are in capped drawdown and withdraw more than the maximum allowed income amount, your account will be converted to a flexi-access drawdown account and your annual contribution allowance will reduce to £4,000.

3 Set up or amend regular income

3.1 Your new income amount

Nil income

Maximum gross income - applicable to Capped Drawdown

Gross income level below the maximum (per annum) £ .

If you are in capped drawdown and withdraw more than the maximum allowed income amount, your account will be converted to a flexi-access drawdown account and your annual allowance will reduce to £4,000.

3.2 How frequently would you like your income to be paid?

Monthly Half yearly

Quarterly Yearly

3.3 When would you like to receive your income?

10th of the month 25th of the month

Your income will be paid to the bank account where income is currently being paid. If you wish to amend your bank details, please complete section 4 of this form.

4 Your bank details

4.1 Account holder name

4.2 Account number

Sort code

4.3 Name and address of bank or building society

Building number/name

Street, city, county and country

Postcode

4.4 Building society collection account number

Building Society accounts - the sort code and building society collection account number can be obtained from your Building Society branch. Please ensure that your Building Society account will accept direct credit payments through the Banks Automated Clearing system. Fidelity does not accept instructions for payments to be made to an account other than the client's own personal account. If the account number and sort code are incorrect, Fidelity will not accept responsibility for any loss incurred by the applicant

5 Declaration

5.1 Declarations

- I authorise Fidelity to make the above changes in relation to my Drawdown Account.
- Where the sale of a fund with a Fund Manager's Sell Charge is required, you authorise us to sell enough of this fund to generate the amount required after those charges.
- I acknowledge that the above changes will be made in accordance with the Fidelity SIPP Terms & Conditions and laws governing these types of pensions.
- I agree for Fidelity to convert my capped drawdown account(s), if applicable, into flexi-access drawdown account(s) if I exceed the maximum income allowed within a pension year.
- I understand that, If this application relates to a capped drawdown account and the capped drawdown account is converted into a flexi-access drawdown account, my annual allowance for money purchase pensions will reduce to the prevailing Money Purchase Annual Allowance.
- I confirm that the information I have given above is accurate to the best of my knowledge.

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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