

The Fidelity SIPP

Regular Savings Plan amendment form for changing regular contributions to a Fidelity Junior SIPP.

Use this form to:

- change the amount being paid into a Fidelity Junior SIPP
- change the fund selection for future regular contributions
- change the bank account from which payments are taken
- change the date on which payments are taken from your bank account.

Don't use this form if:

- you want to make any other changes to the 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.
- Remember to complete and sign the Direct Debit Instruction(s) in section 4.
- Read and sign the Declaration in section 5.

What's next?



Remove 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 the Regular Savings Plan.



Further information on fidelity.co.uk

You should read these documents before completing this form. You will find them at 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 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

No Yes -

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

2.1.6 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)

2.1.7 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

2.1.8 Phone number (in case of query)

2.1.9 Email

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

House number/name

Street, city, county and country

Postcode

4 Contributions (to be completed by the payer)

The majority of minors are non-taxpayers. Non-taxpayers can currently contribute £2,880 to a pension in any one tax year and receive tax relief (£3,600 after tax relief). Please refer to the HMRC website for further information on pension tax relief and the annual allowance.

4.1 Your regular contributions

4.1.1 Please indicate who is currently making the regular payments into the Junior SIPP.

- Guardian
 Third Party (please ensure section 3 is complete)

4.1.2 Do you want to change the regular amount you pay into the plan?

- No
 Yes - what is the regular amount you want to pay into the plan? (min £50) £ .

4.1.2 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.

4.1.3 How often would you like to make a payment?

- Monthly Quarterly Every 6 Months Annually

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

- No
 Yes - We are currently changing our administration system. Please complete both of the attached Direct Debit forms 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 complete both of the attached Direct Debit forms 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



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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5 Investment choices - to be completed by the guardian

5.1 About 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. Your investment choices below will also be used to invest any existing regular contributions made into this account.

IMPORTANT: 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

Should any of your new funds pay income, then income payments will be automatically reinvested 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%		100 %

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6 Application summary

6.1 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 Regular Savings Plan amendment.

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



Date signed

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7 Your application summary

7.1 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.
- 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 set-up and/or Junior SIPP top-up.

Signature of third party

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.