

# Fidelity Personal Pension Top up form (for making a transfer or single/regular payments)

FSIPP30d  
1221

## With this form you can:

- set up a regular payment into an existing plan
- make a single payment into an existing plan
- make additional transfers into an existing plan

If you would like a third party to make payments to your plan (e.g. spouse, civil partner, parent or grandparent) they should complete Appendix 1 at the back of this form. You can also download this form at [fidelity.co.uk/forms](https://www.fidelity.co.uk/forms) or call us on **0800 085 0923**.

The Fidelity Personal Pension is a version of the FundsNetwork SIPP provided by Phoenix Life Limited, trading as Standard Life. Standard Life is the provider and administrator of the scheme and Standard Life Trustee Company Limited is the trustee of the scheme.

## How to contact us:

If you have questions about the Fidelity Personal Pension or need help completing the form, call our dedicated SIPP representatives on **0800 085 0923**.

Please return your complete application form to:

Fidelity  
PO Box 391  
Tadworth KT20 9FU

Visit [fidelity.co.uk](https://www.fidelity.co.uk) for investment ideas for your SIPP.

By filling in this form you are applying to enter into a contract with Phoenix Life Limited, trading as Standard Life and Standard Life will provide you with a copy of this form and the terms and conditions of the contract on request.

The FundsNetwork SIPP is issued by Financial Administration Services Limited. Financial Administration Services Limited is registered in England and Wales (01629709) at Beech Gate Millfield Lane, Lower Kingswood, Tadworth, Surrey, United Kingdom, KT20 6RP, and authorised and regulated by the Financial Conduct Authority.

Phoenix Life Limited, trading as Standard Life, is the provider and scheme administrator, and Standard Life Trustee Company Limited is the trustee of the Fidelity Self Invested Personal Pension Scheme.

Phoenix Life Limited is registered in England and Wales (1016269) at 1 Wythall Green Way, Wythall, Birmingham, B47 6WG, and authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Standard Life Trustee Company Limited is registered in Scotland (SC076046) at Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH

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## Please read the following information before completing the form

### To make this new payment:

- ✓ you should be under 75 years old
- ✓ and either a resident in the UK
- ✓ or a Crown Servant performing duties abroad or married to or in a civil partnership with such a Crown Servant

If you are unsure about whether the above applies to you, you should check with your tax inspector or payroll department.

### It's important to note that with the Fidelity Personal Pension you cannot:

- ✗ take income drawdown
- ✗ transfer pension funds in-specie
- ✗ make partial transfers
- ✗ invest in any assets other than the mutual funds provided by FundsNetwork, Standard Life Investment Policy funds and the SIPP Bank Account

Please see Section 2a for a list of schemes accepted.

If in the future you wish to consider these options you can convert this plan to a fully advised SIPP with Fidelity; however, additional charges may apply. Call Fidelity on 0800 085 0923 for a list of Financial Advisers in your area.

### Transferring pensions into the Fidelity Personal Pension

Please note you cannot transfer benefits from any of the following:

- any scheme where you are an active member
- any Defined Benefit Schemes
- any scheme where there is a guaranteed element to the scheme
- any scheme that is not a registered pension scheme with HMRC
- any Small Self Administered Schemes and any Trustee Investment Plans
- any scheme that is already in income drawdown
- any scheme that has already paid out a partial transfer

You may want to read page 2 of the Key Features Document (FSIPP17d), which summarises the potential risks of pension transfers. Please also note pension transfers can take time to complete, therefore if you do not hear from us after 6 weeks please contact your existing plan administrator or Fidelity for an update.

### Choosing your investments

There are more than 1,200 funds on our fund supermarket to choose from - visit [fidelity.co.uk](https://www.fidelity.co.uk) for the full range. Our Fund Evaluator tool can help you narrow down your choice by comparing fund characteristics such as ratings, performance, initial charges and many more.



Important: Please tear off and keep safely.

## 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, Standard Life will notify you three working days in advance of your account being debited or as otherwise agreed. If you request Standard Life 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 Standard Life 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 Standard Life 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.

# Fidelity Personal Pension Top up form (FSIPP30d)

Please complete in BLOCK CAPITALS using BLACK INK.

## Section 1 - Planholder details

The information supplied will be held in the strictest confidence and is subject to the provisions of Data Protection legislation.

ACCOUNT NUMBER OR CUSTOMER REFERENCE NUMBER

TITLE

SURNAME

MALE OR FEMALE

FIRST NAME(S) IN FULL

ADDRESS ("Care of" and PO Box are not acceptable).  
HOUSE NUMBER AND/OR HOUSE NAME

CONTACT TELEPHONE NUMBER (in case of query)

STREET, CITY, COUNTY AND COUNTRY DETAILS

NATIONAL INSURANCE NUMBER  
(Will be 9 characters: 2 letters, 6 numbers followed by the letter A, B, C, or D.)

POSTCODE

DATE OF BIRTH

EMAIL

ARE YOU A UK NATIONAL ONLY? (PLEASE MARK AN X IN THE BOX)

ARE YOU A UK NATIONAL AND NATIONAL OF ONE OR MORE OTHER COUNTRIES? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW)

ARE YOU A NATIONAL OF NON-UK COUNTRIES ONLY? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW)

NATIONALITY 1

NATIONALITY 2

NATIONALITY 3

NATIONALITY 4

Are you currently:

Employed

Self-Employed

Not Employed

Full Time Education

Pensioner

Carer for a person under age 16

Carer for a person over age 16

Under 16

Other

IF OTHER, PLEASE SPECIFY

If you fall into more than one category please select the most appropriate box.

1a

## Occupational Pension Schemes

1. Are you a member of your employer's occupational pension scheme?

YES

OR

NO

An occupational pension scheme is an employer's pension scheme which promises to provide you with a pension and or a lump sum on retirement.

It does not include:

- (i) any personal pension scheme, or group personal pension scheme, even if your employer pays into it;
- (ii) any stakeholder pension scheme, or group stakeholder pension scheme, even if your employer pays into it;
- (iii) any scheme which pays benefits only on your death; or
- (iv) any scheme which is not registered with HM Revenue & Customs.

The scheme is not necessarily run directly by your employer. It may be a scheme for employees within a particular trade or industry run by a representative body and to which your employer pays.

2. Have you opted out of an occupational pension scheme or are you planning to opt out of an occupational pension scheme in favour of making payments to this plan?

YES

OR

NO

3. Have you chosen not to join an occupational pension scheme which you are currently eligible to join, or which you will be able to join at the end of a specified waiting period, in favour of making payments to this plan?

YES

OR

NO

PLEASE TURN OVER

## Section 2 - Transfers

### Important notes on transferring pension plans

- If you complete this section, please ensure you sign the declaration at the end of this section, as well as the declaration in section 5.
- You should understand the potential risks of pension transfers and the types of pension plans that are not eligible for transfer, which are summarised on page 3 of the Key Features Document (FSIPP17d).
- If you are transferring more than 1 plan please photocopy this page of the Application Form for additional plans and, when complete, attach the photocopies to the Application Form.

## 2a Details of the plan from which you are transferring

REFERENCE POLICY NUMBER

Your 'reference number' or 'policy number' is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

PLEASE SELECT THE TYPE OF PENSION SCHEME

Schemes that can be accepted are:

- |  |  |   |
|--|--|---|
| Personal Pensions <input type="checkbox"/>       | Money purchase schemes with no ongoing employer contributions and where there are no guarantees <input type="checkbox"/>                       | Additional Voluntary Contribution Plans (AVCs) <input type="checkbox"/> |
| Executive pension plans <input type="checkbox"/> | Occupational schemes where you have less than 2 years' pensionable service and where there are no guarantees attached <input type="checkbox"/> |   |

THE SCHEME NAME FROM WHICH YOU WISH TO TRANSFER

NAME OF PENSION ADMINISTRATOR

ADDRESS OF PENSION ADMINISTRATOR  
BUILDING NUMBER AND/OR BUILDING NAME

STREET, CITY, COUNTY AND COUNTRY DETAILS

TELEPHONE NUMBER

POSTCODE

Please ensure you complete ALL of the questions in this section. Please provide a split of this transfer payment as follows by contacting your existing plan provider:

1. What is the estimated total value of this transfer payment?

£  -

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
|  | FULL                     | PARTIAL                  |                          |
| 2. Is this a full or partial transfer?   | <input type="checkbox"/> | <input type="checkbox"/> |                          |
|  | YES                      | OR                       | NO                       |
| 3. Is any part of your transfer payment subject to a pension attachment (earmarking) order?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | YES                      | OR                       | NO                       |
| 4. Does any part of your transfer payment relate to pension benefits which you received from an ex-spouse/ex-civil partner on divorce/dissolution of civil partnership (also known as a pension credit)?           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | YES                      | OR                       | NO                       |
| 5. Was any part of your ex-spouse/ex-civil partner's pension already in payment at the time of the divorce/dissolution of the civil partnership?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | YES                      | OR                       | NO                       |
| 6. If the scheme you are transferring from is an occupational pension scheme, were you given the opportunity to leave the pension credit in your ex-spouse/ex-civil partner's scheme (known as shadow membership)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | YES                      | OR                       | NO                       |

**SIGNATURE AND DATE** (YOU MUST SIGN HERE if you are transferring a pension plan). I confirm I have read the 'Transferring pensions factsheet' and I understand all the potential risks associated with a pension plan transfer. I confirm the pension I wish to transfer is not an ineligible pension plan, that are listed on page 2 of this application form. I confirm Fidelity have not provided me with any financial advice regarding the transfer.

X

X

**For admin puposes only:**  
Transfer payments can be made by BACS, cheque or telegraphic transfer and should be made payable and sent to Standard Life.

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## Section 3 - Your payments

### Important notes on payments

If you have registered for Enhanced Protection or any version of Fixed Protection, you should not make payments, so you should not complete this section. See GEN658 for further details.

- If you 'recycle' a tax-free lump sum you may face a tax charge. Factsheet GEN449 'Recycling of lump sums' explains what recycling means and what the tax consequences are.
- The minimum payment you can make is £300 a month or £3,000 a year or a single payment/transfer of £10,000. (All figures shown are gross.)
- If you choose to have yearly increases then these increases apply to ALL regular payments.
- Single payments must be made by cheque. Remember to enclose the cheque(s) with this application form, made payable to Fidelity.

### Regular payments

- Regular payments must be made by Direct Debit and are due on the same day each month.
- Regular annual payments are due on the same day and month each year.
- You can make occasional payments, stop, start, increase or decrease your payments at any time. There is no charge for doing this.
- The first payment date must be a date after the date you submit the application form. If the due date falls on a weekend or bank holiday, your account will be debited within two working days. The investment dates are the 4th of each month for unit trusts and Onshore funds and the 18th of the month for Offshore funds.

### 3a Single payment details

#### Single Payments

Gross amount of single payment. £

Cheques must be for the NET amount (i.e. less 20% basic rate tax) and made payable to Fidelity.

Please state the (NET) cheque amount. £

### 3b Regular payment details

#### Regular Payments

##### How to work out your gross payments

Simply multiply your net payment by 1.25. The actual amount you pay into your plan will be less than the gross amount you state. This is because the gross amount you state includes the 20% basic-rate tax Standard Life reclaims on your behalf. If you make a gross payment, the way it is calculated is as follows: if you would like to contribute a gross amount of £4,000 to your plan, this will be made up of your net payments of £3,200 and £800 tax relief. In addition if you are a higher or additional rate taxpayer you'll need to claim the extra relief through your tax return. For more information on the tax penalties that will apply to some higher-rate taxpayers, visit [fidelity.co.uk/sipp](http://fidelity.co.uk/sipp).

1. Please state the regular GROSS amount you wish to pay into your plan. £

MONTHLY OR ANNUALLY

2. How often do you want to make the payments stated above?

3. Please choose a date for your first regular payment between the 1st and 28th of the month.

If you are paying into the SIPP regularly you must complete the Direct Debit Mandate in Section 3h.

### 3c Employer's Details

You only need to complete this section if payments to your plan are being made through your employer's bank account. Otherwise continue to section 3f.

#### EMPLOYER'S NAME

#### COMPANY ADDRESS ("Care of" and PO Box are not acceptable.)

##### BUILDING NUMBER AND/OR BUILDING NAME

##### STREET, CITY, COUNTY AND COUNTRY DETAILS

##### POSTCODE

PLEASE TURN OVER

### 3d

## Details of your Employer's Payments

You only need to complete this section if your employer is making payments to your plan including salary sacrifice payments. Otherwise go to section 3f. (Salary sacrifice is the giving up part of your salary in return for an employer payment to your pension plan.)

### Single Payments

If your employer wants to make a single payment please state the GROSS amount.

£  -

Your employers cheque must be for the Gross amount and made payable to Fidelity.

### Regular Payments

1. Please state the regular GROSS amount your employer wants to pay into your plan.

£  -

MONTHLY OR ANNUALLY

2. How often does your employer want to make the payments stated above?

MONTHLY  ANNUALLY

3. Please choose a date for your employer's first regular payment between the 1st and 28th of the month.

2 0

### Contribution Controls

Contribution controls legislation will apply to all your employer's payments. This means that Standard Life must make a report to The Pensions Regulator if any payments are not made by your employer. Any payments made in respect of one month must be received by the 19th of the following month, or by the 22nd for electronic payments.

The legal requirements on employers who are subject to contribution controls legislation mean that Direct Debit can only be used as a payment method if we receive payments at the same frequency as you are paid.

### 3e

## Making Payments through your Employer

You only need to complete this section if you will be making payments through your employer by salary deduction. Otherwise go to Section 3f.

Salary deduction is where your own net payments are deducted from your salary and passed to Standard Life by your employer. This removes the need for a direct debit instruction on your personal account.

1. Please state the total (NET) amount of any payments.

£  -

MONTHLY OR YEARLY OR SINGLE

2. How often do you want to make the payments stated above?

MONTHLY  YEARLY  SINGLE

3. Please choose a date for your employer's first regular payment between the 1st and 28th of the month.

2 0

4. On which date will your employer start deducting payments?

2 0

SINGLE OR MONTHLY OR YEARLY

5. How often will payments be deducted?

SINGLE  MONTHLY  YEARLY

6. If 'Monthly' which date (between 1st and 28th)?

We need to be able to tell when each regular payment is deducted from your salary, e.g. for a regular payment due to be paid to us in January, please advise the date(s) payment will be deducted from your salary.

### 3f

## Automatic Annual Increases

You only need to complete this section if you wish any regular payments (including existing ones) to increase automatically each year. If there are no regular payments being made, please go to section 4.

If you choose this option, Standard Life will automatically apply the increases on the anniversary of the first payment date, unless you specify otherwise. If the date you choose falls within 3 months of the date Standard Life sets up your payment, Standard Life will not increase the payments until your chosen date in the following year. You can only choose this option if you are paying by Direct Debit.

Please note, if you invest in mutual funds then the 'increase amount' will not be automatically invested in the selected mutual funds. Instead it will be placed in the SIPP Bank Account. You must select where you want to invest the 'increase amount' after the increase payment has been collected.

Select only ONE of the following two options:

YES OR NO

1. Do you wish all payments to increase in line with average weekly earnings?

YES  NO

If 'No', answer question 2. If 'Yes', go to question 3.

OR

2. Choose a percentage between 1% and 10% of your previous year's payments.

%

3. When do you want the first automatic increase to occur?

2 0

# Fidelity Personal Pension Top up form (FSIPP30d)

3g

## Direct Debit Instruction for regular payments

Complete the Direct Debit instruction to instruct your bank/building society to make payments from your account. Please ensure that the instruction is signed and dated and the Direct Debit Guarantee is detached before this form is returned to us.

Where there is more than one payer making a regular payment (employer or member) a separate Direct Debit Instruction is required. Please photocopy this page of the Application Form as necessary.

**Instruction to your Bank or Building Society to pay by Direct Debit.** Please pay Standard Life 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 Standard Life and, if so, details will be passed electronically to my Bank/Building Society. Banks and Building Societies may not accept Direct Debit instructions for some types of accounts.



**NAME(S) OF ACCOUNT HOLDER(S)**

**ORIGINATORS REFERENCE NUMBER (Fidelity use Only)**

**NAME AND ADDRESS OF BANK OR BUILDING SOCIETY**


**BANK/BUILDING SOCIETY ACCOUNT NUMBER**

--	--	--	--	--	--	--	--

**BRANCH SORT CODE**

--	--	--	--	--	--

**SIGNATURE AND DATE (YOU MUST SIGN HERE). You must also sign Section 5.)**

**X**

**X**

--	--	--	--	--	--	--	--

Originators Identification Number: 991524

## Section 4 - Investing your payments

### Important notes on investing your payments

- We will process all payments as per the instructions you give in this form. Where we cannot achieve this we will contact you. As we do not know when the money will be available we cannot guarantee any asset or fund prices.
- A minimum investment of £50 per fund applies.

### 4a

### Choosing your investments

Please ensure you include the Fund Code as your fund choice will be derived by the Fund Code and not the Fund Name. When completing Fund Name information ensure that you specify either an 'income' or an 'accumulation' version of your chosen fund. If you do not include this information, your fund choice will default to the 'accumulation' version.

A European Union directive requires fund managers to produce a key information document for most funds. This document sets out key information about the fund including the objectives and risks of the fund, what it invests in and its charges. It is important that you read the key information document before selecting the fund which is available at [fidelity.co.uk](http://fidelity.co.uk).

You can find details of all investment options including Fund Codes at [www.fidelity.co.uk](http://www.fidelity.co.uk).

FUND CODE	FUND NAME	TRANSFER/ SINGLE PAYMENTS	REGULAR PAYMENTS
<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"/> %
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<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<b>Amount to be invested in the SIPP Bank Account</b>		<input type="text"/> %	<input type="text"/> %

Where I have chosen an income fund (s), I would like this income paid into the SIPP Bank Account.

You can get the latest rate by calling Fidelity. The 'SIPP Bank Account' is a bank account owned and used by Standard Life Trustee Company Limited (the scheme trustee). This account can be used to provide:

- any money required to purchase any investments
- any tax-free lump sum
- a facility to maintain cash on deposit.



# Fidelity Personal Pension Top up form (FSIPP30d)

## Section 5 Declaration and Signature

### Data Protection Notice — Important, please read

All parties on this form have a right to know that FundsNetwork and Standard Life hold personal data about them and what purposes it will be used for. Please give them an opportunity to read this notice.

- (1) The personal information which you (including all parties named on the application for this plan) provide to FundsNetwork will be passed to Standard Life and will be used by FundsNetwork and Standard Life for the following purposes:
  - (a) to administer the SIPP for which you apply;
  - (b) to comply with legal and regulatory requirements;
  - (c) to identify you when you contact FundsNetwork or Standard Life;
  - (d) for internal analysis and research; andFundsNetwork and Standard Life may use external third parties to process such personal information on its behalf in accordance with these purposes.
- (2) If your application does not proceed, the personal information you gave to Standard Life in relation to your application will be held on Standard's Life records for seven years before it is deleted.
- (3) FundsNetwork and Standard Life will keep the information you have supplied confidential, and will not disclose it unless it is lawful to do so.
- (4) FundsNetwork and Standard Life may share your personal information with the following third parties:
  - (a) any other party to the business relationship whom you tell us about (please notify FundsNetwork in writing if you no longer wish your personal information to be shared with any such party);
  - (b) other associated or affiliated FundsNetwork or other parts of the Phoenix Group (Phoenix Group Holdings plc and its subsidiaries) and other companies we work with to support us for the purposes set out in this data protection statement;
  - (c) the Unclaimed Assets Register, in connection with the possible recovery by you of (for example) unclaimed distribution payments;
  - (d) other organisations for any of the following purposes: (1) compliance with any legal or regulatory requirements; (2) to protect FundsNetwork and Standard Life and their customers from theft and fraud; and (3) to take appropriate steps if FundsNetwork or Standard Life considers your levels of trading funds made available by FundsNetwork to be short-term, excessive or disruptive.
- (5) Except as outlined in (iv) above or otherwise required by law, your personal information will not be passed to anyone without your permission.
- (6) Please note that the personal information which you provide will be processed by FundsNetwork and Standard Life or associated or affiliated companies which may be based outside of the EEA. This may involve the transfer of data by electronic media including the internet. Where your data is transferred outside of the UK, FundsNetwork and/or Standard Life will ensure that the recipient agrees to keep your information confidential and hold it securely in accordance with the requirements of data protection law.
- (7) If the top up form in respect of your plan was completed on your behalf pursuant to a power of attorney, the personal information provided in respect of such power of attorney (including information about your mental health) may be processed by FundsNetwork and Standard Life and its associated and affiliated companies and held for the purpose of administering your plan.
- (8) With limited exceptions, you may ask for a copy of the personal information which FundsNetwork and/or Standard Life hold on you. We are allowed by law to make a charge for this. I understand that I can access the key information documents for my chosen funds (where available) from the [standardlife.co.uk](http://standardlife.co.uk) website or by calling Standard Life. If any of the information which we hold about you is incorrect, please tell FundsNetwork and it will be amended. You can write to Fidelity, PO Box 391, Tadworth, KT20 9FU.
- (9) FundsNetwork and Standard Life may monitor and record your telephone calls to FundsNetwork and Standard Life for verification and training purposes.

### (10) How can Fidelity's experts help me?

We want to help you stay informed about how to make the most of your savings. To tell us how you want to receive your expert financial insights, simply visit [www.fidelity.co.uk/preferences](http://www.fidelity.co.uk/preferences) now.

### Money Laundering

To comply with the Money Laundering Regulations, we may verify your identity by carrying out an online check with a reference agency. Where an online check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties. We regret that we cannot offer an alternative unless the online check does not confirm your identity, in which case we will carry out a manual check.

## 5a Declaration & Signature — you must sign and date the form overleaf

### Important notes

#### HM Revenue & Customs warning

This application will also be used as an application for tax relief at source. If you give false information you may be prosecuted.

#### Declaration by Standard Life

If Standard Life accepts this application, it hereby agrees as administrator and provider in terms of the rules of the Fidelity Self Invested Personal Pension Scheme to administer the Scheme as required by the rules.

#### Your Declaration

1. I, the person named in Section 1 of this application, request that the benefits described in or arising from payments specified in the application be provided for me under the Fidelity Self Invested Personal Pension Scheme, and in consideration of its acceptance I undertake to be bound in all respects by the rules of the Scheme in force from time to time.
2. I declare that to the best of my knowledge and belief, the statements made in this application whether in my handwriting or not, are correct and complete.
3. I declare that I have read the 'SIPP Terms and Conditions (FSIPP62)', the Direct Customer Terms and Conditions (FSIPP62D) and 'SIPP Key Features Document (FSIPP17d)' and agree to be bound by them.
4. I have read and understood the Data Protection Notice contained in Section 5.
5. I agree to the FundsNetwork client terms of business.
6. I confirm that I have regular access to the internet to use the website [www.fidelity.co.uk](http://www.fidelity.co.uk) to obtain fund information and agree to the provision of this information via this medium or have otherwise been provided with paper versions of this information.
7. I confirm that I have been provided with the key information documents for my chosen funds (where available) at [fidelity.co.uk](http://fidelity.co.uk) or by calling **0800 085 0923**.

#### If I am applying to make a regular or single payment(s)

8. I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004, will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year. (The 'basic amount' for the current tax year is £3,600 gross. This may change in future tax years.)
9. I declare that I will tell Standard Life if an event occurs (such as those listed in my Key Features Document) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the event occurs, or within 30 days of the event if this is later.

#### If I am applying to make a transfer payment

##### My declarations to the administrators of the transferring schemes named in Section 2

10. I authorise and instruct you to transfer funds from the plan(s) as listed in Section 2 directly to Standard Life. Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer(s) listed in Section 2 of this application.

**5a Declaration & Signature — you must sign and date the form below (continued)**

- 11. I authorise you to release all necessary information to Standard Life to enable the transfer of funds to Standard Life.
- 12. If an employer is paying contributions to any of the plans as listed in Section 2, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).
- 13. Until this application is accepted and complete, Standard Life’s responsibility is limited to the return of the total payment(s) to the administrator of the transferring scheme.
- 14. Where the payment(s) made to Standard Life represent(s) all of the funds under the plan(s) listed in Section 2, then payment made as requested will discharge the administrator of the transferring scheme of all claims and responsibilities in respect of the plan(s) listed.
- 15. Where the payment(s) made to Standard Life represent(s) part of the funds under the plan(s) listed in Section 2, then the administrator of the transferring scheme will be discharged of all claims and responsibilities only in respect of the part of the plan(s) represented by the payment(s).

**My declarations to Standard Life & the administrators of the transferring schemes**

- 16. I promise to accept responsibility in respect of any claims, losses and expenses that Standard Life and the administrator of the transferring scheme may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

**SIGNATURE AND DATE (YOU MUST SIGN HERE — Please ensure all relevant sections are completed as per the instructions on this form)**

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**Before returning your form to us please ensure you have:**

- checked if you are eligible for this plan
- if making a single payment, enclosed a signed and dated cheque, payable to Fidelity
- read all declarations and signed where necessary
- if you are making a transfer read the transfer fact sheet and, sign the declaration on page 4

**Please send your completed form to Fidelity, PO Box 391, Tadworth, KT20 9FU.**

**5b Only complete this section if payments are being made for a person under the age of 16. Declaration & Signature of Legal Guardian — you must sign and date the form below**

**TITLE**    
**SURNAME**

**FIRST NAME(S) IN FULL**

**PERMANENT RESIDENTIAL ADDRESS (“Care of” and PO Box are not acceptable). HOUSE NAME AND/OR NUMBER**

**HOME TELEPHONE NUMBER**

**STREET, CITY, COUNTY AND COUNTRY DETAILS**

**DAYTIME TELEPHONE NUMBER (in case of query)**

**HOW LONG HAVE YOU BEEN AT THIS ADDRESS**

**POSTCODE**

**DATE OF BIRTH**

**YEARS**

**MONTHS**

- I understand that the payments made to this Scheme in respect of the person named in Section 1 will only be returned to them in the form of benefits payable under the rules of the Scheme. In particular I understand that no benefits will be returned to them before age 55 unless the person is incapacitated.
- I also understand that until the person reaches age 16, I am responsible for ensuring that the payment limits set by the Revenue are not exceeded.

If you are the legal guardian, please ensure you have carefully read Section 5 (Data Protection Notice) and Section 5a (Declaration & Signature), and please ensure that you have completed all of the relevant sections and have signed the box below.

**SIGNATURE AND DATE (YOU MUST SIGN HERE — Please ensure all relevant sections are completed as per the instructions on this form)**

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