Fidelity INTERNATIONAL

Personal Investing

The Fidelity SIPP

Junior SIPP switch form for making changes to the funds in your Junior SIPP. Alternatively you can make a switch by calling us on 0800 358 7480

Use this form to:

- change the funds being invested in
- move from fund(s) to fund(s)
- move from fund(s) to cash within the account
- move from cash within the account to fund(s).

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.

☐ Check the funds you are switching into total 100%.

☐ Read and sign the Declaration in section 4.

What's next?

Remove and keep this cover page, then send the completed form to:

Fidelity
PO Box 391
Tadworth
KT20 9FU

We will carry out your switch instructions and send you a confirmation within a few days. You will receive one confirmation for the sale of the funds and another for the purchase of new funds.

Further information on fidelity.co.uk

The following documents govern the Fidelity Junior SIPP and you should read them 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 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**

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FILSIPPJNRSWT

1 About the Applicant (this should be the details of the child)

1.1 Applicant's details

1.1.1 Surname

1.1.2 First and other names in full

1.1.3 Date of birth (DDMMYYYY) **Town of birth**

1.1.4 Country of birth

1.1.5 Do they have a National Insurance number? A National Insurance number is usually issued by HMRC shortly before the child's 16th birthday

☐ No ☐ Yes –

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

1.1.7 Are they 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 they 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 Their address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

1.1.10 What is their Fidelity SIPP account number?

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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 Date of birth (DDMMYYYY) **Town of birth**

2.1.5 Country of birth

2.1.6 Employment status

☐ Employed ☐ Self-employed ☐ Unemployed ☐ Full-time education

☐ Pensioner ☐ Caring for children under 16 ☐ Other – please specify below.

2.1.7 Driving Licence number (if applicable – 18 characters as shown on your photocard)

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

2.1.9 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) ☐

2.1.10 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**

2.1.11 Phone numbers

Home

Mobile

2.1.12 Email

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2 About the legal guardian of the Applicant (continued)

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

House number/name

Street, city, county and country

Postcode

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3 Investment choices

3.1 Switch instructions

This form is for switching funds and cash only. Should you wish to change exchange traded investments please use our online service at fidelity.co.uk. To perform a switch please use the 'Switch from' section to let us know which of the funds you wish to sell and the percentage of each to be sold. For example, to switch entirely out of a fund please enter 100% for that fund. If you specify 40%, then we will sell 40% of the current holding. You must then use the 'Switch to' section to let us know how to invest the proceeds. For example to invest half of the proceeds into a specific fund, enter the fund details and 50%. You may specify some or all of the cash within the account to be included in the switch. Fund manager buy and sell charges may apply.

Need help choosing investments? We offer a wide range of investment options for personal pensions. If you don't know where to start and need some support, there's Retirement Builder - a single fund idea for pensions. Information about Retirement Builder is available alongside this form. All our investment options are available to view on our website: **fidelity.co.uk/sipp-investments**

Please ensure you include the fund code as the 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 the new funds pay income, we will follow the existing preferences for income payments on the account.

Switch from:

Fund code	Fund name	Percentage of existing holding to be switched
		%
		%
		%
		%
		%
	Cash within my account	%

Switch to:

Fund code	Fund name	Percentage of holding to be bought
		%
		%
		%
		%
		%
	Cash within my account	%
	Totals should add up to 100%	1 0 0 %

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4 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).
- 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 I have selected Retirement Builder as the investment choice - I understand that the fund that Retirement Builder currently invests in may be swapped for an alternative fund following periodic reviews. If this happens, I agree to the investment being automatically switched into the replacement fund. Fidelity will inform me once this has been done.
- I confirm that I have not received advice from Fidelity in connection with this switch.

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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