


The Fidelity SIPP Income amendment form

Use this form to set up or amend regular income payments or to take a one off income payment from your income drawdown account.



- 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.

<p>Use this form to:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Set up or amend regular payments <input checked="" type="checkbox"/> Take a one-off income payment 	<p>Don't use this form if:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> You want to make payment from a third party or employer <input checked="" type="checkbox"/> You want to open an account with joint holders or held in trust 	<p>Important information</p> <p>You should read all relevant documents before completing this form. You will find them at fidelity.co.uk/legal/before-you-invest</p>
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How to use this form

Please complete all sections of the form as indicated below. Your application may be delayed or sent back to you if the form is not completed properly. In some circumstances we may need to contact you.

Section	Section description	Mandatory
1	About you	Yes
2	Payment instructions	Yes
3	Bank details	Yes
4	Declarations and signature	Yes



If you have any questions in relation to this form, give us a free phone call on:

0800 41 41 61

Section 1 – About you



If you have more than one income drawdown account, and wish to amend income for other accounts, please complete a separate form for each account.

1.1 About You – you must complete this

Mr Mrs Ms Other:

First name(s)

Surname

Date of birth

(DDMMYYYY)

Town of birth

Country of birth



You can find your National Insurance Number on a payslip or a letter from HMRC or DWP.

National Insurance Number

OR

I don't have one

I am a UK National only (Please mark an X in the box)

I am a UK National and National of one or more other countries (Please mark an X in the box and list all other countries below)

I am a National of Non-UK countries only? (Please mark an X in the box and list all other countries below)

Nationality 1

Nationality 3

Nationality 2

Nationality 4



Fidelity SIPP Account Number

Please provide your existing account number.

Account Number

Section 2 – Payments

2.1 One-off income payment request



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 the Money Purchase Annual Allowance.

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

2.2 Set up or amend regular income



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 the Money Purchase Annual Allowance.

Your new income amount

- Nil income
- Maximum gross income – applicable to Capped Drawdown
- Annual specified amount £

How frequently would you like your income to be paid? – select one

- Monthly
- Quarterly
- Every 6 Months
- Annually

When would you like to receive your income? – select one

- 10th
- OR
- 25th

The investments we take your regular withdrawals from

We will take the money for your regular withdrawals from any cash in your Pension Drawdown Account. If there isn't enough cash in the account to cover a payment, we will sell some of your largest fund holding. If your account doesn't contain enough cash or funds to cover a payment, we will sell shares in your largest exchange traded investment, which could be a company shareholding, investment trust, exchange traded fund or exchange traded commodity. Each sale of an exchange traded investment incurs a £1.50 dealing fee.

Alternatively, you can use the boxes below to give us details of any investment you would prefer your regular income payments to come from. Please include the correct code for any fund you choose – you can find this on the fund factsheet at fidelity.co.uk

Fund code

Fund name

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 3 – Bank details



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

Account holder name

Account number

Sort code

Name and address of bank or building society

Building number

OR

Building name

Postcode

Street, city, county and country

Building Society collection account number

Section 4 – Declarations and signature

4.1 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

Print Name

Date signed (DDMMYYYY)

Next Steps

Where to send the form

Please send the form to:



Fidelity
PO Box 391
Tadworth KT20 9FU