

How to complete this form

Use this form to make a single personal contribution by bank transfer, set up a regular monthly personal contribution by direct debit or to arrange contributions from your employer or another person (third party).

1 Important: All contributions to your SIPP, together with contributions to any other pensions you may have count towards your Annual Allowance or, where applicable, the Money Purchase Annual Allowance.

1 Once completed, please save this form, and send via secure message from your online account. Having sent the completed form to us, single payments should be made as detailed in Section 5.

Section 1 - Account holder's details

Title First name(s)

Surname

MR

AJEEFTT

CHINTNIS

SIPP Account Number

5 6 5 0 6 0 7

National Insurance Number

S T 6 0 6 7 0 S B

Are you registered for any form of Lifetime Allowance (LTA) protection?

Yes

No

If you applied to the HMRC for protection, it will be Enhanced, Fixed, Individual or Primary.

Contributing to your SIPP from 6 April 2023 may no longer validate Enhanced or Fixed Protections according to when the Protection was applied for.

1 Important: If either of these Protections apply to you, before making contributions you must read the information which can be found at <https://www.ii.co.uk/pensions/contributions/lifetime-allowance-tax-free-cash-pension-protections>.

We also recommend you speak with a financial adviser before making any decision to make a contribution if either of these protections apply to you.

If you have ticked 'Yes', which type of protection do you have?

Protection type

NOT APPLICABLE

I have enclosed a copy of my:

Protection Certificate

Permanent Reference Number

Section 2 - Employer & Employee contributions

- !** We recommend seeking advice from a suitably qualified financial advisor before making any contributions. Pension and tax rules depend on your circumstances and may change in future.

Please provide details of your employer below. This information is required to carry out appropriate checks to verify the Company.

Employer name

JSA Services Ltd t/a Workwell Solutions

Contact Name

Nishma Parmar

Role

Payroll/Pensions Administrator

If you are employed by a limited Company or limited liability partnership, please provide the Company Registration Number (CRN) and Registered Office Address in the spaces provided. The CRN is used to identify the Company as an entity registered with Companies House.

Company reg. number

02407547

Registered office address

Radius House, 51 Clarendon Road, Watford,
Hertfordshire WD17 1HP

If you are employed by a general partnership or registered as a self-employed individual, please provide the Unique Tax Reference (UTR) in the space provided. A UTR number is a 10-digit number unique to each UK taxpayer.

- !** If you are employed by a partnership, the partnership will have its own UTR number and you will need to provide the UTR number for the Company.

Unique Tax Reference

2791798093

- !** Please provide up-to-date correspondence from HMRC to show your UTR number. You should be able to find this on your HMRC Tax Return; HMRC Statement of Account; Payment Reminders or Late Payment Letters; or your SA250 which is a letter issued by HMRC when you first registered as self-employed.



Contributions received from your employer can be Employer Pension Contributions or Employee Pension Contributions. Employer contributions should be paid gross and we will not make any claim for the payment of basic rate tax relief, however, contributions made on your behalf as an employee are made net and we will claim basic rate tax relief on your behalf (Note: contributions made to a pension from age 75 are NOT eligible for tax relief hence we will NOT claim tax relief from HMRC). It usually takes 6-11 weeks to receive the tax reclaim from the HMRC and is paid on or around the 25th of the month. Any higher rate relief should be claimed via your own annual self-assessment tax return.

Single bank transfer contributions

- i** If making a lump sum contribution, please arrange for the contribution to be sent by bank transfer - See section 5.

Please enter the amount(s) of your employer contribution (gross) and / or employee contribution (net) being made:

Single employer contribution - Gross

£ 12480

Single employee contribution - Net

£

Monthly Direct Debit contributions

- i** If your employer want to make contributions monthly, they can set up a direct debit to your ii SIPP. Monthly contributions can only be collected by Direct Debit. If your employer intends to send regular contributions by bank transfer, you will need to complete a separate form for each contribution.

Please enter the amount(s) of your employer contribution (gross) and / or employee contribution (net) being made:

Monthly employer contribution - Gross

£

Monthly employee contribution - Net

£

All employer contributions by Direct Debit are collected on the 1st day of the month, or next working day, and monthly thereafter. A Direct Debit can take up to 10 working days to become active so, provided we receive the completed form in time, your first payment will be collected on the 1st of the following month. We will send you a Direct Debit notification before the first Direct Debit is collected to confirm your start date.

- i** Please complete the Direct Debit Instruction (DDI) on the last page.

- i** The DDI must be signed with a wet signature and not an e-signature as per current BACS Direct Debit Rules. We can accept a scanned copy of the DDI, however, it must be signed with a wet signature prior to scanning.

Section 3 - Third Party Contributions

Single contributions may be made by a third party i.e., neither you nor your employer. These contributions are treated as if they were made by you and count towards your Annual Allowance. They will be treated as 'net' contribution on which we will claim basic rate tax relief on your behalf (Note: contributions made to a pension from age 75 are NOT eligible for tax relief hence we will NOT claim tax relief from HMRC). It usually takes 6-11 weeks to receive the tax reclaim from the HMRC and is paid on or around the 25th of the month. Any higher rate relief should be claimed via your annual self-assessment tax return.

If the Third Party has an existing ii Account, please provide the Account Number:

Third party's name

Date of Birth

Address

Relationship to account holder

Amount

£

I confirm that I am aged 18 or over and consent to interactive investor using my personal details to carry out any appropriate checks that it may require in order to comply with, for example, Anti-Money Laundering and fraud prevention requirements. I understand that recipients of these enquires may retain a record of the enquiry.

Third party's signature (Print and sign)

Date

Section 4 - Personal Contributions

Personal contributions can be made net or gross (no tax relief due). For net contributions we will claim basic rate tax relief on your behalf (Note: contributions made to a pension from age 75 are NOT eligible for tax relief hence we will NOT claim tax relief from HMRC). It usually takes 6-11 weeks to receive the tax reclaim from the HMRC and is paid on or around the 25th of the month. Any higher rate relief should be claimed via your own annual self-assessment tax return.

- !** We recommend seeking advice from a suitably qualified financial advisor before making any contributions. Pension and tax rules depend on your circumstances and may change in future.

Single contributions

- i** If making a lump sum contribution, please arrange for the contribution to be sent by bank transfer - See section 5. You will need to complete a separate form for each contribution sent.

Amount

£

This contribution is:

Net Gross

Monthly contributions

- i** If you want to make contributions monthly, you can set up a direct debit to your ii SIPP. Monthly contributions can only be collected by Direct Debit. If you intend to send regular contributions by bank transfer, you will need to complete a separate form for each contribution.

Amount

£

This contribution is:

Net Gross

All personal contributions by Direct Debit are collected on the 12th day of the month, or next working day, and monthly thereafter. A Direct Debit can take up to 10 working days to become active so, provided we receive the completed form in time, your first payment will be collected on the 12th of the following month. We will send you a Direct Debit notification before the first Direct Debit is collected to confirm your start date.

- !** Please complete the Direct Debit Instruction (DDI) on the last page.
- i** The DDI must be signed with a wet signature and not an e-signature as per current BACS Direct Debit Rules. We can accept a scanned copy of the DDI, however, it must be signed with a wet signature prior to scanning.

Section 5 - Contribution Payment Details

Please make contribution payments to:

Account name - Investor SIPP Trustees Limited

Account Number - 55095364 Sort Code - 60-60-05

Section 6 - Account holder's declaration

! You must select ONE option below and sign and date the form in the space provided. If no option is selected, more than one option is selected or there is no signature / date, we will not be able to use the form.

These contributions will not exceed my Annual Allowance in the current tax year

These payments will exceed my Annual Allowance in the current tax year and I am utilising some, or all, of my available Carry Forward Allowance from the previous three tax years.

I am subject to the Money Purchase Annual Allowance (MPAA) and I confirm that these payments, will not exceed that allowance in the current tax year in which tax relief is eligible

Date MPAA was triggered / / / /

! Further information can be found at www.ii.co.uk/pensions/contributions

I confirm that:

To the best of my knowledge and belief the details provided in this form are correct, complete, and not misleading and that the information provided in the application for my SIPP is still valid, except for any changes specifically advised to Interactive Investor.

I am a relevant UK individual (see attached notes).

The total contributions paid by myself, and/or by my employer or another third party, to my SIPP and to other registered pension schemes, in respect of which I am entitled to tax relief under section 188 of Finance Act 2004 will not exceed, in any tax year, the higher of:

- The basic amount (£3,600 gross for the current tax year and from then on until the Government notifies otherwise); or
- My relevant UK earnings (see Note 2 below) in that year, subject to not exceeding the Annual Allowance or any such lower amount that may apply to me.

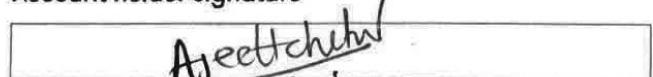
I am aware that contributions made to a pension from age 75 are NOT eligible for tax relief hence the operator will NOT claim tax relief from HMRC.

I will notify the operator in writing if an event occurs as a result of which I will no longer be entitled to tax relief by the later of:

- 5th April in the year of assessment in which the event occurs; and
- The date which is 30 days after the occurrence of that event.

I understand it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

Account holder signature



Date (This Form is valid for 30 days from the date signed)

0 2 / 0 1 / 2 0 2 6