



AVALON FREEDOM SIPP ADDITIONAL CONTRIBUTION INSTRUCTION FORM

For Personal Contributions only (for Additional Employer Paid Contributions a separate form is available for completion – do not use this form)

Please complete this form as fully as possible in block capitals.

1. Personal details

Existing SIPP Ref No

Client name

Permanent Residential Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
Post Code <input type="text"/>

Care of and PO Box addresses are not acceptable. If you wish us to correspond with you at an alternative address, please advise us on a separate sheet

E-mail

2. Enhanced Protection

A certificate of Enhanced Protection is in place.

Yes No

Important: if you have enhanced protection any contribution made to this plan means that you will lose this protection. We strongly recommend you speak to your financial adviser.

3. Occupation and Eligibility

Please tick one of the following

I am:

Employed	<input type="checkbox"/>
Pensioner	<input type="checkbox"/>
Self employed	<input type="checkbox"/>
Child under the age of 16	<input type="checkbox"/>
Caring for children under the age of 16	<input type="checkbox"/>
Caring for a person over the age of 16	<input type="checkbox"/>
In full time education	<input type="checkbox"/>
Unemployed	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

4. Personal Contributions

How much would you like to pay into your SIPP?

4.1 Net single contribution

Tax relief will be claimed from HMRC at the prevailing basic rate of tax.

4.2 Will your personal additional contribution be made from a bank account other than your own personal bank account?

Yes No

If no, we will require a fully completed Certificate of Verification of Identity completed by your financial adviser for the third party. Failure to supply this will delay the application.

4.3 Source of Funds

Transfer from another pension scheme	<input type="checkbox"/>
Savings	<input type="checkbox"/>
Divorce Settlement	<input type="checkbox"/>
Inheritance	<input type="checkbox"/>
Lottery or other winnings	<input type="checkbox"/>
Property sale	<input type="checkbox"/>
Gift	<input type="checkbox"/>
Pension commencement lump sum	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

5. General Declaration

This declaration should be signed by all applicants including the legal guardian of an applicant who is under the age of 18.

I declare that:

- To the best of my knowledge and belief, the statements included in this application are true and complete
- I am a UK resident or am overseas as a Crown Servant or spouse/partner of a Crown Servant
- I understand that I should advise the Trustee in writing within 30 days if there is any change in my employment (including becoming unemployed); any change to my residency status; any change in my name or permanent residential address
- If I am no longer entitled to tax relief on my contributions I will undertake to tell Avalon Investment Services Ltd in writing no later than the 5 April in the year of assessment in which it occurs or within 30 days of this change

Signed:

Name:

Date:

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6. IFA Remuneration and Declaration

Name of financial adviser

Company name

Contact Address

Post Code

Telephone Number

FSA number

Commission due

Or % of the additional contribution

If you are to receive a % of the contribution this will be based on the gross additional contribution.

Please send this form together with:

A fully completed Certificate of Verification of Identity for the cheque payee (if required, see 4).

A cheque for the additional contribution amount payable to Avalon SIPP Client Money Account

Please submit these items to:

SIPP New Business
Avalon Investment Services Ltd
2 Market Place
Tetbury
Gloucestershire
GL8 8DA

The Avalon Freedom SIPP is a self invested personal pension provided and marketed by Avalon Investment Services Limited.

Avalon Investment Services Limited is the provider and administrator of the Avalon Freedom Self Invested Personal Pension Plan and has appointed Avalon SIPP Trustees Limited as trustee of the Scheme

www.avaloninvestment.com