

The Lifetime SIPP

High Net Worth Declaration

Member Name:

Scheme Number: National Insurance No:

I declare that I am a certified high net worth individual for the purposes of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2001.

I understand that this means:

(a) I can receive financial promotions that may not have been approved by a person authorised by the Financial Conduct Authority;

(b) the content of such financial promotions may not conform to rules issued by the Financial Conduct Authority;

(c) by signing this statement I may lose significant rights;

(d) I may have no right to complain to either of the following:

- i. the Financial Conduct Authority; or
- ii. the Financial Ombudsman Scheme;

(e) I may have no right to seek compensation from the Financial Services Compensation Scheme.

I am a certified high net worth individual because at least one of the following applies:

(a) I had, during the financial year immediately preceding the date below, an annual income to the value of £100,000 or more;

(b) I held, throughout the financial year immediately preceding the date below, net assets to the value of £250,000 or more. Net assets for these purposes do not include:

- i. the property which is my primary residence or any loan secured on that residence;
- ii. any rights of mine under a qualifying contract of insurance within the meaning of the Financial Services and Markets Act 2000 (Regulated Activities) Order 2001; or
- iii. any benefits (in the form of pensions or otherwise) which are payable on the termination of my service or on my death or retirement and to which I am (or my dependants are), or may be, entitled.

I accept that I can lose my property and other assets from making investment decisions based on financial promotions.

Signed:

Date:

Investment Manager or Financial Adviser

I certify that I have carried out the relevant checks and have suitably certified the above named client as an High Net Worth individual.

Signed:

Date:

Company Name:

FCA Ref:

Please return completed form to:

The Lifetime SIPP Company Ltd, 8th Floor, 25 Marsh Street, Bristol, BS1 4AQ
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