

The Hartley SIPP

Third Party Contributions Form

Title: Surname:

Forenames:

SIPP Scheme Number:

Single Contributions Third Party (net) £ Third Party (gross) £

Regular Contributions Third Party (net) £ Third Party (gross) £

Member's Annual Personal income:

Commencement Date of Regular Contributions (if applicable)

Frequency of regular Contributions

Monthly: Quarterly: Half Yearly: Annually: Payable by Direct Debit:

Details of the Third Party

Third Party Name:

Third Party address:
Postcode:

Company House Number: (if applicable)

Relationship to Member:

Tax Entitlement

Please read the statement below and select the one that applies to you to enable us to establish whether you are eligible for tax relief or whether any limits apply:-

1. I have relevant UK earnings chargeable to Income Tax or general earnings from Overseas Crown Employment subject to UK tax in this year;
2. I have, or will have been a resident in the UK at some point during this tax year;
3. My Spouse/Civil Partner, has general earnings from Overseas Crown Employment subject to UK tax for this year.
4. I, or my Spouse/Civil Partner, are in Overseas Crown Employment but for this tax year do not have relevant UK earnings subject to UK Tax;
5. None of the above;

1 or 2 – Lifetime will reclaim basic rate tax on your personal pension contributions.

3 or 4 – Lifetime will reclaim basic rate tax on personal pension contributions up to £3,600 gross.

5 – Lifetime will not reclaim any tax relief on personal contributions.

Please continue on to the second page of the form.

HMRC Pension Protection

Please advise if you have registered for Protection with HMRC in order to protect any pension funds built up prior to April 2006.

- | | |
|-----------------------------------|-------------------------------------|
| <input type="checkbox"/> Enhanced | <input type="checkbox"/> Individual |
| <input type="checkbox"/> Primary | <input type="checkbox"/> Fixed 2014 |
| <input type="checkbox"/> Fixed | |

Please note: if you have HMRC Protection and make a contribution in to your SIPP, the Protection may be lost which could result in a tax liability. It is recommended that you take advice from an Independent Financial Adviser.

Please ensure that any cheque representing a contribution to your SIPP is made payable to: "The Hartley SIPP re (members name)"

If regular contributions are to commence please complete the Direct Debit form included in our Application pack, a copy is available from The Lifetime SIPP Company Limited upon request.

Personal Contributions are payable net of basic rate tax.

Declaration

- I confirm that the total gross contributions made to all UK registered pension schemes of which I am entitled to tax relief in any year will not exceed the higher of £3,600 gross or 100% of my UK relevant earnings.
- I will notify the Scheme Administrator if I am no longer entitled to tax relief on my contributions no later than the end of the tax year or within 30 days of from the date of change.
- I confirm that the information provided on this Contribution Form is correct.

It is a serious offence to make false statements and doing so could lead to prosecution.

Signed:

Dated:

Please return completed form to:

The Hartley SIPP c/o The Lifetime SIPP Company Ltd
Broad Quay House, Prince Street, Bristol BS1 4DJ

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