

Your SIPP form



If you wish to transfer an existing pension(s) to a Self Invested Personal Pension and/or want to make a new contribution, please complete this straightforward form.

This is not an application form, but will help us to check that you are eligible to invest in a SIPP and also pre-populate any subsequent application forms. Once we receive this form, we will review your eligibility and then get in touch to discuss the next steps. As we may need to ask you further questions please provide us with an appropriate telephone number.

If you have any questions or simply require further information, please do not hesitate to contact us by email sipp@bestinvest.co.uk or call 0800 970 9142.

Your details

Full name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Date of birth	<input type="text"/>	Daytime tel	<input type="text"/>
National insurance no.	<input type="text"/>	Occupation	<input type="text"/>

Employment status

Employed Self Employed Unemployed Pensioner In full time education

Do you wish to transfer any existing personal pensions to a SIPP?

Transfer payment 1

Scheme name	<input type="text"/>		
Reference no. or policy no.	<input type="text"/>	Approx. transfer value	<input type="text"/>
Personal Pension <input type="checkbox"/>	Executive Pension <input type="checkbox"/>	Company Pension (not Final Salary) <input type="checkbox"/>	
Please tick this box if you are already drawing an income from your pension <input type="checkbox"/>			
Name of scheme administrator	<input type="text"/>		

Transfer payment 2

Scheme name	<input type="text"/>		
Reference no. or policy no.	<input type="text"/>	Approx. transfer value	<input type="text"/>
Personal Pension <input type="checkbox"/>	Executive Pension <input type="checkbox"/>	Company Pension (not Final Salary) <input type="checkbox"/>	
Please tick this box if you are already drawing an income from your pension <input type="checkbox"/>			
Name of scheme administrator	<input type="text"/>		

Please attach information of additional pension transfers on a supplementary sheet.

Contributions

Do you wish to make regular or single payment(s) into a SIPP? Yes No

If yes, please state your current annual earnings £

Intended single contributions (see note 1)

For personal contributions, the gross amount is equivalent to your net contribution divided by 0.80 e.g. you write a cheque for £8,000, so the gross contribution is (£8,000/0.80) £10,000.

Personal contribution £ gross

Employer contribution £ gross

Intended regular contributions

For personal contributions, the gross amount is equivalent to your net contribution divided by 0.80 e.g. you set up a direct debit for £800, so the gross contribution is (£800/0.80) £1,000.

Personal contribution £ gross

Employer contribution £ gross

Investment objectives

Expected retirement age (50-75) (see note 2)

When you retire would you prefer to buy an annuity (swap your pension fund for an income for life) or draw income from the fund (which remains invested)?

Annuity Draw income Undecided

How much downside risk can you tolerate?

Nil 10% 20% 30%

Investment selection

Once we have established your eligibility to invest in a SIPP our advisers can review your objectives and make an appropriate fund choice recommendation. There is normally no explicit charge for this service if your pension fund contains at least £50,000 of trail commission paying funds.

Notes

- Contributions - the maximum sum that will attract tax relief will be the lower of your relevant UK earnings and the annual limit of £235,000.
- Your expected retirement age can be between your 50th - 75th birthdays (55 -75 from 6th April 2010 onwards). If you do not enter an age we will assume it to be 65 or, if you are already 65, your next birthday.

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When completed please return in the pre-paid envelope provided or post to

Bestinvest (Brokers) Ltd, PO Box 6266, London W1J 5EZ

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sipp@bestinvest.co.uk
www.bestinvest.co.uk/sipp

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