

# The Fidelity SIPP

**Top up form for employers** making additional contributions to your Fidelity SIPP.

## Use this form to:

- allow your employer to set up a Regular Savings Plan for your Fidelity SIPP
- allow an employer to make additional single contribution(s) to your Fidelity SIPP.

## Don't use this form if:

- you haven't yet opened your Fidelity SIPP
- you want to set up contributions to your Fidelity SIPP from either you, your spouse/civil partner or other third party
- you want to amend a Regular Savings Plan you already have on your Fidelity SIPP.

## Before you fill in this form:

- make sure you read the important documents shown in the box to the right.

## How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this:
- if you make a mistake, please correct it but don't use correction fluid.

## Checklist

- Check that you have answered all the relevant questions.
- If your employer is making a single contribution by cheque, remember to attach the cheque(s) as per section 2. Please ensure that the cheque is made from your employer's account.
- If your employer is making a regular contribution, remember to ask them to complete and sign the Direct Debit Instruction in section 2.
- Read and sign the Declaration in section 4.

## What's next?



Remove the Direct Debit Guarantee, then send your completed form to:

**Fidelity**  
**PO Box 391**  
**Tadworth**  
**KT20 9FU**

We will write to confirm when we have set up the Regular Savings Plan and/or invested the additional contributions.



## Further information on [fidelity.co.uk](https://www.fidelity.co.uk)

You should read these documents before completing this form. You will find them at [fidelity.co.uk/sippinfo](https://www.fidelity.co.uk/sippinfo)

- Key Features Document - this summarises everything you need to know about the Fidelity SIPP
- When choosing your funds make sure you read the key information document which sets out key information about the fund including the objectives and risks, what it invests in and its charges.

## Want to talk to us?

Freephone **0800 358 7480**



1 About you

1.1 Your details

1.1.1 Title

Mr Mrs Ms Other: [grid]

1.1.2 Surname

[grid]

1.1.3 First and other names in full

[grid]

1.1.4 Date of birth (DDMMYYYY) Town of birth

[grid] [grid]

1.1.5 Country of birth

[grid]

1.1.6 Employment status

Employed Self-employed Unemployed Full-time education Pensioner Caring for children under 16 Other - please specify below.

[grid]

1.1.7 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

No Yes - [grid]

1.1.8 Are you a UK National only? (Please mark an X in the box)

[checkbox]

1.1.9 Are you a UK National and National of one or more other countries?

(Please mark an X in the box and list all other countries below)

[checkbox]

1.1.10 Are you a National of Non-UK countries only?

(Please mark an X in the box and list all other countries below)

[checkbox]

Nationality 1

[grid]

Nationality 2

[grid]

Nationality 3

[grid]

Nationality 4

[grid]

1.1.11 Driving Licence number (if applicable - 18 characters as shown on your photocard)

[grid] [grid]

1.1.12 Phone numbers

Home [grid]

Mobile [grid]









### 3 Your investment choices

#### 3.1 About investing your contributions

Once we hold your money in cash, we will follow your investment instructions below. If you want to invest in exchange-traded investments (ETIs), you can do this online once your money is in your account.

**Need help choosing investments?** We offer a wide range of investment options for your personal pension. If you don't know where to start and need some support, there's Retirement Builder - a single fund idea for your pension. Information about Retirement Builder is available alongside this form. All our investment options are available to view on our website: [fidelity.co.uk/sipp-investments](https://fidelity.co.uk/sipp-investments)

Please ensure you include the fund code as your fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at [fidelity.co.uk](https://fidelity.co.uk). If you are starting a new regular contribution we will also use your investment choices below to invest any existing regular contributions to this account.

Should any of your new funds pay income, we will follow your existing preferences for income payments on your account.

Fund code	Fund name	Single contribution	Regular contribution
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
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<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<b>Amount to be paid into cash within my account</b>		<input type="text"/> %	<input type="text"/> %
<b>Totals should add up to 100%</b>		<input type="text" value="100"/> %	<input type="text" value="100"/> %

10.23/v18.0/

FILSIPRSPUpEmp



## 4 Your application summary

### 4.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I have been provided with and read:
  - the latest version of the Key Features Document
  - Doing Business with Fidelity incorporating the Fidelity Client Terms
  - the key information documents relevant to the chosen fund(s).
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- If I have selected Retirement Builder as my investment choice - I understand that the fund that Retirement Builder currently invests in may be swapped for an alternative fund following periodic reviews. If this happens, I agree to my investment being automatically switched into the replacement fund. Fidelity will inform me once this has been done.
- If contributions are to be paid:
  - a) I am under age 75 and a relevant UK individual under Section 189 of Finance Act 2004 and not a US person
  - b) the total of the member contributions paid to my Fidelity SIPP and to other registered pension schemes, on 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 (currently £3,600 gross); or
    - 100% of my relevant UK earnings (as defined in Section 189 of Finance Act 2004 in the tax year);
  - c) the declaration in b) is correct, to the best of my knowledge and belief;
  - d) I will give notice to the Scheme Administrator if an event occurs, as a result of which I will no longer be entitled to relief on my contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
    - end of the tax year in which the event occurs; and
    - 30 days of the event
- I confirm that I have not received advice from Fidelity in connection with this Regular Savings Plan set-up and/or SIPP top-up.

### Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

#### Signature



Date signed

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**Important: A Direct Debit Guarantee should be retained by the relevant payer.**

## The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, FIL SIPP Trustee (UK) Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request FIL SIPP Trustee (UK) Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by FIL SIPP Trustee (UK) Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – If you receive a refund you are not entitled to, you must pay it back when FIL SIPP Trustee (UK) Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.