

Cofunds SIPP via Chelsea FundStore

Questionnaire

PLEASE COMPLETE ALL APPLICABLE FIELDS.

Once completed, please email to: info@chelseafs.co.uk, or post to **Chelsea Financial Services, St James Hall, Moore Park Road, London SW6 2JS**

Your details

Mr/Mrs/Ms/Miss/Other
First name
Surname
Email address
Telephone number
Date of birth
Marital status
National Insurance number
Country of residence
Selected retirement age

Address
Postcode

If you have lived in the property for less than two years please supply your previous address:

Address
Postcode

Financial information

Your annual earnings (please tick one):

£0 – £14,999	<input type="checkbox"/>
£15,000 – £29,999	<input type="checkbox"/>
£30,000 – £59,999	<input type="checkbox"/>
£60,000 – £99,999	<input type="checkbox"/>
£100,000 – £149,999	<input type="checkbox"/>
£150,000+	<input type="checkbox"/>

Source of wealth (please tick one):

Income from employment	<input type="checkbox"/>
Income from savings/investment	<input type="checkbox"/>
Other (please state)	<input type="text"/>

Employment status and occupation

Employer's name and address

Contributions

This can be by you and/or your employer. Please ensure that you have read the Key Investor Information Documents for the funds before investing.

How much will you be investing, on a monthly basis?*

How much will your employer be investing, on a monthly basis (if applicable)?

Will you be making a lump sum payment?* If yes, how much?

*Personal contributions should be paid net (less 20% of the full amount).
For example, to contribute £1,000, write £800 in the box and on any cheques.
Cheques must be made payable to **Cofunds Ltd**.

Transferring to the Cofunds SIPP, via Chelsea FundStore

Remember, you will need to contact your current provider to request a **discharge form**.

Full name of transferring pension scheme

Type of scheme to be transferred (please tick one): Personal pension Self Invested Personal Pension Other (please state)

Will you be making a lump sum payment?* If yes, how much?

If you have more than one pension to transfer, please email us at info@chelseafs.com