



Additional Contribution Form



IN ASSOCIATION WITH



2 Contributions

Please indicate the amount of contributions to be paid to your SIPP:-

Single Contribution

Member (net) £ Employer (gross) £

Regular Contribution

Member (net) £ per month Employer (gross) £ per month

Member Contribution

Please tick one or more of the following boxes to indicate from which source member contributions are to be funded:-

- i) Income from employment v) Divorce settlement
- ii) Investment/Savings vi) Other
- iii) Inheritance If Other (please specify)
- iv) Property sale

Member contributions are contributions paid by the member personally, or by someone else on the member's behalf, e.g. a parent, grandparent or spouse. They do not include employer contributions.

All member contributions are payable net of basic rate tax (20% for the 2009/10 tax year). We will reclaim basic rate tax from HM Revenue & Customs (HMRC) and credit it to the SIPP cash account. If the member is a higher rate tax payer, the difference between any higher rate and basic rate tax relief to which the member is entitled can be reclaimed via self assessment. Please note that if you are paying contributions on behalf of the member you will not be entitled to reclaim the difference between higher rate and basic rate tax relief.

All employer contributions are payable gross. Where an employer intends to pay regular contributions by direct debit payments MUST be made from a UK bank or building society account in the employer's name. Single contributions must also be paid by cheque drawn on a UK bank or building society account in the employer's name.

If your employer is to pay contributions on your behalf, please advise your employer's name, registered office address and post code:-

Employer's Name

Registered Office Address

Post Code

Is the employer listed on a recognised stock exchange? Yes No

3 Declarations

I declare that, to the best of my knowledge and belief the details provided in this form are correct, complete and not misleading and that the information provided in the application for my SIPP is still valid, except for any changes specifically advised to the Sippcentre.

I further declare that:-

- a) I (or the member if this declaration is being made by a parent or legal guardian) am under age 75 and am a relevant UK individual (see Note 1); or
- b) the total of the member contributions paid to this Scheme and to other registered pension schemes, on which I (or the member, if this declaration is being made by a parent or legal guardian) am entitled to tax relief, under section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
- i) the basic amount (£3,600 gross for the 2009/10 tax year); or
- ii) 100% of my (or the member's, if this declaration is being made by a parent or legal guardian) relevant UK earnings (see Note 2) in that 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 (or the member, if this declaration is being made by a parent or legal guardian) will no longer be entitled to relief on member contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:

- i) 5th April in the year of assessment in which the event occurs; and
- ii) the date which is 30 days after the occurrence of that event.

I confirm that Adviser Remuneration must be paid in accordance with the existing Adviser Remuneration option selected previously.

Note 1: An individual is a **relevant UK individual** for a tax year if they:

- a) have relevant UK earnings (see Note 2) chargeable to income tax for that tax year; or
- b) are resident in the UK at some time during that tax year; or
- c) were resident in the UK at some time during the five tax years immediately before the tax year in question and they were also resident in the UK when they joined the pension scheme; or
- d) have for that tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of the Income Tax (Earnings and Pensions) Act 2003 (ITEPA)); or
- e) are the spouse of an individual who has for the tax year general earnings from overseas Crown employment subject to UK tax (as defined by section 28 of ITEPA).

For individuals within b) to e) above, who do not have relevant UK earnings, the maximum member contribution is the basic amount (£3,600 gross for the 2009/10 tax year).

3 Declarations (cont)

Note 2: Relevant UK earnings are:

- a) employment income such as salary, wages, bonus, overtime, commission chargeable to tax under section 7 (2) Income Tax (Earnings and Pensions) Act 2003 (ITEPA); or
- b) income derived from the carrying on or exercise of a trade, profession or vocation (whether individually or as a partner acting personally in a partnership) chargeable under Part 2 Income Tax (Trading and Other Income) Act 2005; or

- c) income arising from patent rights and treated as earned income under section 833 (5B) Income and Corporation Taxes Act 1988 (ICTA); or
- d) general earnings from an overseas Crown employment which are subject to tax in accordance with section 28 of ITEPA 2003.

Where relevant UK earnings are not taxable in the United Kingdom due to a double taxation agreement (section 788 of ICTA 1988), those earnings are not regarded as chargeable to income tax and so will not count towards the annual limit for relief.

Please sign and date the application and return it to:-

**Sippcentre
Trafford House
Chester Road
Manchester
M32 0RS
Tel: 0845 83 99 060
Fax: 0845 83 99 061**

I understand it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

If the member is under age 18 the parent or legal guardian must sign.

Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>

4 Regulatory

A J Bell includes A J Bell Holdings Limited and its wholly owned subsidiaries A J Bell Management Limited, A J Bell Limited and A J Bell Securities Limited.

A J Bell Management Limited is authorised and regulated by the Financial Services Authority. A J Bell Securities Limited is a member of the London Stock Exchange and is authorised and regulated by the Financial Services Authority.

Sippdeal, Sippdealxtra and Sippcentre are platforms provided by A J Bell Management Limited. A J Bell Platinum SIPP is provided by A J Bell Management Limited. A J Bell Platinum SSAS is provided by A J Bell Limited.

The companies listed in the adjacent table are all registered in England and Wales at Trafford House, Chester Road, Manchester M32 0RS.

Company	Company Number	VAT Number
A J Bell Holdings Limited	4503206	833 5478 13
A J Bell Management Limited	3948391	759 3531 03
A J Bell Limited	3091664	639 0316 44
A J Bell Securities Limited	2723420	918 4226 21