



SIPPcentre SIPP Investments Application



The Key Features of the Cofunds Platform that accompanies this application form is:

This application form should be used for making SIPPcentre SIPP investments through Cofunds. Please note that you must also complete a SIPPcentre Application Form available from your Nominated Intermediary.

Please complete this application form using black ink in BLOCK CAPITALS and return to: Chelsea Financial Services, St James Hall, Moore Park Road, London SW6 2JS.

1 Intermediary Details For Intermediary use only:

Cofunds Intermediary Authorisation Code	77	% Initial Commission waived	100%
Intermediary Client/Deal Ref.			

2 Member Details Please complete this section in full

Existing Cofunds Client Reference (if applicable)

Did you receive advice from an Intermediary in relation to this investment?
 Not Advised

Mr/Mrs/Ms/Miss/Other

Surname

Full First Name(s)

National Insurance Number

Daytime Tel. No.

Email Address

Male Female Date of Birth / /

(If more than one previous address in the last 2 years, please provide full details including the time at each address on a separate sheet of paper and staple securely to this application form.)

Current Permanent Residential Address

 Postcode

Time at this Address yrs mths

If at current address for less than 2 years, please supply previous address and time there

 Postcode

Time at this Address yrs mths

3 Income

Indicate here where you would like income generated from income producing funds to be paid. Choosing one of the options below will alter where income is being paid for all Cofunds collective investments held under your SIPPcentre SIPP. In the absence of any instruction, any income generated will be re-invested or follow your previous instruction.

Re-invested **OR**

Paid into Cofunds Trading Account

4 Investment Instruction

Standing Investment Instruction

Use this section to set up a continuous investment instruction for all contributions, transfers and tax relief into your SIPPcentre SIPP (as per your investment selection overleaf). This will remain in force unless otherwise instructed.

To change your standing investment instruction, you must complete a new SIPPcentre SIPP Investments Application and submit to your Nominated Intermediary.

On receipt of your application at Cofunds, it will take up to 5 working days to process the request. If any monies are received within this period, Cofunds may invest according to any previous investment strategy.

Your Nominated Intermediary may have given you the ability to place deals online. If you do place a deal online, it will not alter your standing investment instruction. All future contributions will follow your most recent standing investment instruction. Please tick all that apply:

Tick this box if you would like all contributions, including any future contributions, to follow the investment instruction overleaf (i.e. either setting up or altering standing investment instruction).

Tick this box if this investment instruction is to apply to all monies currently held in your Cofunds Trading Account. This is only applicable if you are altering an existing standing investment instruction.

4 Investment Instruction continued

Investment selection

I wish to invest 100% of my contribution into one of the following Chelsea Easy Retirement Portfolios (minimum initial contribution £10,000) (please tick one of the portfolios below): Please tick one (✓)

Either	Cautious Growth Easy Retirement Portfolio	<input checked="" type="checkbox"/>
Or	Balanced Growth Easy Retirement Portfolio	<input type="checkbox"/>
Or	Aggressive Growth Easy Retirement Portfolio	<input type="checkbox"/>
Or	High Alpha Retirement Portfolio	<input type="checkbox"/>

Or select your own funds and complete this section below:

I wish to invest in the funds indicated.

Minimum investment £1,000 per fund (Lump Sum). Minimum regular investment of £50 per fund. If investing in an OEIC fund, your investment will be made in the Retail Share Class. For details of the funds available, please speak to your nominated intermediary.

Fund Manager and Fund Name	Type of Unit/Share (Delete as appropriate)*	Percentage	Monthly Regular Investment Min £50 per fund**
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
	Accumulation/Income		£
TOTAL (This must equal 100%)		100%	£

* Accumulation/Income – If you do not specify Accumulation or Income in this column, Cofunds will not be able to process your application (see Viewpoint magazine for further information).

** You must ensure that sufficient monies are available in your SIPP Cash Account for regular investment. Please refer to the SIPPcentre SIPP Cofunds Customer Agreement for more information.

5 Declaration and Authorisation

I confirm that:

I understand that the investment account with Cofunds will be set up in my name, as the holder of a SIPPcentre SIPP. The trustee of my SIPP is Sippdeal Trustees Limited and I agree that no money will be transferred to, or from, the Cofunds investment account without its authority. I understand that either I, or my Nominated Intermediary, will have authority to give instructions direct to Cofunds for the purchase, sale or switching of investments within the investment account.

I have read and understood the Platform Key Features (refer to Viewpoint magazine) document and the SIPPcentre Customer Agreement and agree to be bound by the terms within.

Together with the Key Features of the Cofunds Platform Key Features and the Cofunds SIPPcentre customer agreement, this application constitutes my agreement with Cofunds Limited.

I understand that instructions may be delayed or rejected if this application form is not complete in all respects.

The investment instructions on this form supersede all previous investment instructions in respect of the SIPPcentre SIPP to which they apply.

You may undertake a search with a reference agency for the purposes of verifying my identity. To do so, the reference agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access.

They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained as an identity search. I declare that the information contained in this application form is correct to the best of my knowledge and belief.

I am aged 18 or over.

Data Protection

Cofunds Limited will use your information for the administration and servicing of your investments and all other related activities. We may disclose your information to our agents and service providers for these purposes. We may also disclose your information to organisations for compliance with legal and regulatory requirements.

With the exception of the above provisions, we will not pass on your details to any other third party without your permission, but we will disclose information concerning your investment to your Nominated Intermediary.

Cofunds may transfer your information to countries outside the EEA for the servicing of your investments. In such cases, contracts will be put in place to ensure that the service providers protect your information in accordance with the requirements of the Data Protection Act.

If you require a Fund prospectus, please contact your Intermediary or Fund Manager directly.

Member Signature 	Date
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