

7IM SIPP Top-up Contribution Form



PLEASE PRINT CLEARLY IN BLOCK CAPITALS AND COMPLETE ALL APPLICABLE SECTIONS OF THIS FORM.

Please complete this form (including declaration) and email back to us instead of completing a 7IM SIPP Contribution Form. We have put in additional security measures to ensure that documents sent electronically arrive safe and securely. Please contact your Relationship Manager beforehand who will happily guide you through how to do this.

Please note:

This form is only for lump sum top-up contributions. You will not be able to complete this form if your client has not yet previously completed a 7IM SIPP Contribution Form or has only paid member contributions in the past. Instead please contact your Relationship Manager for further guidance.

Please fill out the 7IM SIPP member details in relation to the payment that has been made to the 7IM SIPP Trustee Bank Account.

Client Name:

7IM SIPP Reference:

Member One-off Contribution Amount (net):

Employer One-off Contribution Amount (gross):

Employer Name:

Declaration

- I confirm that the member is a relevant UK individual
- I confirm that the total contributions to the 7IM SIPP and any other registered pension scheme, in respect of which the member is entitled to tax relief, does not exceed the higher of:
 - the basic amount (£2,880 net / £3,600 gross), or
 - their relevant UK earnings for that tax year
- Where total gross contributions exceed the Annual Allowance, I can confirm that the client has sufficient unused carry forward allowance to make the contribution.

Adviser Name:

Firm Name:

Date of Declaration:

PLEASE RETURN THIS FORM TO 7IM INVESTMENT AND RETIREMENT SOLUTIONS LIMITED,
1 ANGEL COURT, LONDON EC2R 7HJ

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