

7IM SIPP Add Or Amend Contribution Form



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

Use this form if you want to pay an additional one-off contribution, or if you want to start or amend regular monthly contributions to an existing 7IM SIPP.

Section 01 About you

Member Full Name:

7IM SIPP Account Number

Section 02 Contributions

The purpose of this form is for instructions of personal contributions only and should not include employers contributions. Please complete Employers Contribution Form if required.

We are only able to accept contributions from you, if, at the time of payment:

- you have Relevant UK Earnings liable to income tax for that tax year; or
- you are resident in the UK at some time during that tax year; or
- you were resident in the UK both at some time during the five years immediately before that tax year and when you became a member of the pension scheme; or
- you or your spouse has, for the tax year, general earnings from overseas Crown employment subject to UK tax.

Please tick this box to confirm that at least one of the above applies to you.

If you have ticked one of the boxes above, we will pre-fund basic rate tax relief and add it to your personal contributions before investing them. We will then claim this back from HMRC.

Under current tax laws, if you are a higher or additional rate tax payer, you will be entitled to claim the difference between basic rate and your actual rate of tax through your self-assessment tax return.

One-off Contribution
(minimum £1,000):

£		net
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Please send a cheque payable to 7IM Trustees Limited

Regular Contribution per
month (minimum £100):

£		net
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Please complete the direct debit mandate included with this form

Please indicate your preferred direct debit collection date:

1st

15th

Please ensure this form and your direct debit instruction are correctly completed and returned to us in time for the first intended direct debit collection date.

It can take up to 15 working days to set up a direct debit, and the first direct debit will be collected on the next collection date after the direct debit has been set up. If a collection date falls on a weekend or bank holiday, the direct debit will be collected on the next working day.

We use GoCardless to process your direct debit payments. More information on how GoCardless processes your personal data and your data protection rights, including your right to object, is available at <https://gocardless.com/legal/privacy/>

Are your contributions being funded via your employment income? Yes

No

If No, please describe the source of your investment wealth in the box below:

Section 03 Investment of regular contributions

If you are paying regular contributions, please confirm which 7IM Fund(s) you would like to purchase with these regular payments. Please provide the % split ensuring the total adds up to 100%.

7IM Fund (name in full, including share class, if known)	SEDOL	%
<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"/>
TOTAL:		<input type="text"/>

For the purposes of compliance with applicable tax laws, where I am making contributions to the 7IM SIPP:

- I confirm that I am a Relevant UK Individual:
- I confirm that the total payments to the 7IM SIPP and any other Registered Pension Scheme in respect of which I am entitled to tax relief on my contributions under section 188 of the Financial Act 2004 will not exceed the higher of the Basic Amount or my Relevant UK Earnings for that tax year within the meaning of section 189 of that Act: and
- I confirm that I will notify the SIPP Operator and Scheme Administrator of any relevant events which means that I will no longer be entitled to relief for any contributions pursuant to Section 188 of Finance Act 2004, and I will do so before the end of the tax year in which the event occurs or within 30 days of the event.

Your signature is required for the completion of this form.

Signature:

Signed by (please PRINT name):

Date:

**PLEASE RETURN THIS FORM TO 7IM INVESTMENT AND RETIREMENT SOLUTIONS LIMITED,
55 BISHOPSGATE, LONDON EC2N 3AS**

7IM Investment and Retirement Solutions Limited is authorised and regulated by the Financial Conduct Authority. Registered address 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales number 10902511.



Please complete and return to:

7IM Investment & Retirement Solutions LTD
55 Bishopsgate
London
EC2N 3AS

Instruction to your bank or building society to pay by Direct Debit

Name(s) of account holder(s)

Service User Number

1	6	2	0	7	3
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Bank/Building Society account number

Reference (Office use only)

Branch sort code

Instruction to your Bank or Building Society

Please pay GoCardless re 7IM Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with GoCardless re 7IM and, if so, details will be passed electronically to my bank/building society.

Name and full postal address of your Bank/Building Society

Signature(s)

Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

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 GoCardless re 7IM will notify you 3 working days in advance of your account being debited or as otherwise agreed. If you request GoCardless re 7IM 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 GoCardless re 7IM 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 GoCardless re 7IM 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.