



### IPM PERSONAL PENSION SCHEME

#### 1 MEMBER'S PERSONAL DETAILS

Title  Surname   
Forenames in full  Membership No.

#### 2 CONTRIBUTIONS

**Personal contributions:**

Current regular contribution amount net £  New regular contribution amount net £

Date of start for new amount

**Employer contributions:**

Current regular contribution amount gross £  New regular contribution amount gross £

Date of start for new amount

Please ensure that you have contacted the payee bank to arranging for the standing order to be amended. This form is for IPM's records only.

### 3 MEMBERS DECLARATION

The applicant (or Legal Guardian, where the applicant is under the age of 18) must read and sign this declaration.

I hereby wish to contribute to my membership of the IPM Personal Pension Scheme (the Scheme) and agree to be bound by the scheme rules that may be amended from time to time.

I hereby declare that I will not attempt to draw any benefit from the scheme except in accordance with the rules of the scheme

**As I am making contributions to the scheme I declare:**

- I am under 75 years of age and a Relevant UK Individual (having the meaning given by Section 189 Finance Act 2004)
- The total contributions I am paying to all registered pension schemes (having the meaning given by Section 150 Finance Act 2004) in respect of which I am entitled to tax relief (having the meaning given by Section 188 Finance Act 2004) will not exceed the higher of:
  - (a) the basic amount (£3,600 for the tax year 2006/7)
  - or
  - (b) 100% of my relevant UK earnings (having the meaning given by Section 189 Finance Act 2004) for that tax year
- I will, within 30 days or by 5th April in the relevant year of assessment (whichever is the later), inform the scheme administrator in writing if any of the following events occur:
- I cease to be a UK resident
- I cease to be a Relevant UK Individual
- I cease to have relevant UK earnings
- I cease to be eligible for relief on member contributions under Section 188 Finance Act 2004
- I hereby declare that to the best of my knowledge and belief the details given in relation to the payment of contributions is correct and complete.

I agree to the scheme administrator deducting any amount from the fund held for my benefit in order to pay any charge, including any scheme sanction charge, levied by HM Revenue and Customs. In the event that there are insufficient funds held for my benefit I agree to personally pay to the scheme administrator any amount required to pay for such charges.

To the best of my knowledge and belief the details given on this application are correct and complete.

Where this application is being made on behalf of an applicant who is under the age of 18, the Legal Guardian signing the application also declares that:

- I am making this application on behalf of the applicant detailed in section 1 of this form
- I understand that I am responsible for the SIPP as if I were the member and will continue to be so until the applicants 18th birthday
- I understand that contributions paid to the scheme may only be returned to the applicant in the form of benefits payable under the rules of the scheme (i.e. after the applicant attains age 55 except in the case of earlier ill health).

Signature

Date

**Please note that it is a serious offence to make false statements, the penalties for which can be severe and may lead to prosecution.**

Please return the completed form to:

**I.P.M. SIPP Administration Limited. Cambridge House, Campus Six, Caxton Way, Stevenage, Hertfordshire, SG1 2XD**

Please make any cheques payable to "I.P.M. Personal Pension Trustees Ltd. re:[your name]".

I.P.M. SIPP Administration Limited is Authorised and Regulated by the Financial Conduct Authority .



**I.P.M. SIPP Administration Limited** • Cambridge House, Unit B, Campus Six, Caxton Way, Stevenage, Hertfordshire, SG1 2XD

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