



IPM PERSONAL PENSION SCHEME

Member Name

SIPP Reference Number

Name of Investment House

Full Fund Name

SEDOL Number (if appropriate)

Our Investment Instruction is

For the above investment we have enclosed the following application form / paperwork

Please ensure that any area of the documentation relating to fund selection is pre-completed before submission to IPM

Please ensure any request for adviser / agency details (including any adviser charges) are pre-completed before submission to IPM

We have obtained the member confirmation to proceed with this transaction

Yes No

We have enclosed a copy of the member's confirmation

Yes No

In some circumstances certain investments may require an additional side agreement to be signed by the adviser or the client before proceeding

We are a Discretionary Fund Manager and already have a global agreement with the member

Yes No

We have obtained confirmation from the client regarding an agreed fee for this instruction

Yes No

We have enclosed a copy of the client's fee agreement

Yes No

We understand that you require confirmation from the member where possible regarding any investment instruction which we provide you with. We have therefore completed this document to confirm that we have consulted with the member in this instance.

Signed Name

Company Name

FCA Number Date

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

Tel: 01438 747 151 • Fax: 01438 357 344 • Email: info@ipm-pensions.co.uk • Web: www.ipm-pensions.co.uk