



IPM PERSONAL PENSION SCHEME

If you have a vulnerability or need specific support during the life of your SIPP, please let us know. You do not need to tell us what it is, just how we can help to make things easier.

This form acts as the Member's authorisation for I.P.M. SIPP Administration Limited and I.P.M. Personal Pension Trustees Limited (both for the purposes of this document to be referred to as IPM) to pay the charges as specified in Section 3 from their SIPP fund to the adviser specified in Section 2 of this document.

1 MEMBER DETAILS

Member's Name

Member's IPM SIPP Number

2 ADVISER DETAILS

Name of Authorised Person

Full name of Regulated Firm

Contact Address

Telephone

Fax

E-mail Address

Name of Regulator

Regulator's reference number (For Firm)

Regulator's reference number (For individual)

Please confirm whether you are independent or restricted:

Independent

Restricted

If you are not directly regulated but instead regulated as an appointed representative or part of a network, please provide details:

Name of principal or network

Regulator's reference no. for principal or network

3 DETAILS OF ADVISER CHARGES

This section should be completed if the Member authorises IPM to pay adviser charges from the SIPP to the adviser as specified in Section 2 of this document.

	Fixed Charges (Excl VAT)		Percentage charges (Excl VAT)	
Initial charge	<input type="text"/>	and / or	<input type="text"/>	of the current fund value
On going charges	<input type="text"/>	and / or	<input type="text"/>	of the current fund value

Any on going adviser charges should be paid on the basis specified below

Annually

Quarterly

Monthly

For initial charges to be paid from the SIPP, IPM will require an invoice from the appointed adviser in line with the above. For on-going charges IPM will require an invoice to be submitted by the appointed adviser on an annual basis to facilitate this, regardless of the frequency of payment.

4 MEMBER DECLARATION

I authorise IPM to pay my adviser the adviser charges as specified in Section 3 of this document.

I understand that an adviser charge will be paid from my SIPP bank account on receipt of an invoice or paid by my nominated investment manager to the firm detailed in Section 2 of this document

I confirm that any adviser charges are genuinely commercial arrangements between myself and my adviser and only relate to pensions advice and service provided

I understand that VAT may be added to the above figures where necessary by my adviser. As such IPM has my authority to may the payment with the prevailing rate of VAT added to the above adviser charges.

I authorise IPM to pay the adviser charges as specified in Section 3 of this document from the bank account held on for my benefit or realise investments attributable to me in order to pay such charges.

I understand that IPM will continue to arrange settlement of any fees as specified in Section 3 of this document to the firm detailed in Section 2 of this document until such time as I notify IPM in writing to the contrary

Member's Signature

Date

5 ADVISER DECLARATION

I confirm that I have the appropriate authorisation to sign this declaration for the firm detailed in Section 2 of this document.

I understand that IPM will not settle any fees due to the firm detailed in Section 2 of this document until IPM receives an invoice which requests payment in line with the agreed fee structure as specified in Section 3 of this document.

I confirm that any adviser charges are genuinely commercial arrangements between my firm and the Member detailed in Section 1 of this document and only relate to pensions advice and service provided

I confirm that should the firm detailed in Section 2 of this document cease to provide an on going service to the client detailed in Section 1 of this document we will notify IPM in writing and any on going adviser charges will cease to be paid

Adviser's signature

Date



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