

# The Fidelity SIPP

**Regular Savings Plan amendment form** for changing regular contributions to a Fidelity Junior SIPP.

## Use this form to:

- change the amount being paid into a Fidelity Junior SIPP
- change the fund selection for future regular contributions
- change the bank account from which payments are taken
- change the date on which payments are taken from the bank account.

## Don't use this form if:

- you want to make any other changes to the Fidelity Junior SIPP.

## Before you fill in this form:

- make sure you read the important documents shown in the box to the right.

## How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this:
- if you make a mistake, please correct it but don't use correction fluid.

## Checklist

- Check that you have answered all the relevant questions.
- Remember to complete and sign the Direct Debit Instruction in section 4.
- Read and sign the Declaration in section(s) 6 and 7.

## What's next?



Remove the Direct Debit Guarantee, then send your completed form to:

**Fidelity**  
**PO Box 391**  
**Tadworth**  
**KT20 9FU**

We will write to confirm when we have made changes to the Regular Savings Plan.



## Further information on [fidelity.co.uk](https://www.fidelity.co.uk)

You should read these documents before completing this form. You will find them at [fidelity.co.uk/sippinfo](https://www.fidelity.co.uk/sippinfo)

- Key Features Document – this summarises everything you need to know about the Fidelity Junior SIPP.
- When choosing funds make sure you read the key information document which sets out key information about the fund including the objectives and risks, what it invests in and its charges.

## Want to talk to us?

Freephone **0800 358 7480**



**1 About the Applicant** (this should be the details of the child)

**1.1 Applicant's details**

**1.1.1 Surname**

[Grid for Surname]

**1.1.2 First and other names in full**

[Grid for First and other names in full]

**1.1.3 Date of birth (DDMMYYYY)**

[Grid for Date of birth]

**Town of birth**

[Grid for Town of birth]

**1.1.4 Country of birth**

[Grid for Country of birth]

**1.1.5 Do they have a National Insurance number?** A National Insurance number is usually issued by HMRC shortly before the child's 16th birthday

No  Yes - [Grid]

**1.1.6 Are they a UK National only?** (Please mark an X in the box)

**1.1.7 Are they a UK National and National of one or more other countries?**   
Please mark an X in the box and list all other countries below)

**1.1.8 Are they a National of Non-UK countries only?**   
(Please mark an X in the box and list all other countries below)

**Nationality 1**

[Grid for Nationality 1]

**Nationality 2**

[Grid for Nationality 2]

**Nationality 3**

[Grid for Nationality 3]

**Nationality 4**

[Grid for Nationality 4]

**1.1.9 Their address. 'Care of' and PO Box are not acceptable.**

House number/name

[Grid for House number/name]

Street, city, county and country

[Grid for Street, city, county and country]

[Grid for Street, city, county and country]

[Grid for Street, city, county and country]

Postcode

[Grid for Postcode]

**1.1.10 Employment status**

Employed  Self-employed  Unemployed  Full-time education

Other - please specify below

[Grid for Other - please specify below]

**1.1.11 What is their Fidelity SIPP account number?**

[Grid for Fidelity SIPP account number]

## 2 About the legal guardian of the Applicant

### 2.1 Your details

#### 2.1.1 Title

Mr  Mrs  Ms  Other:

#### 2.1.2 Surname

#### 2.1.3 First and other names in full

#### 2.1.4 Date of birth (DDMMYYYY)

#### Town of birth

#### 2.1.5 Country of birth

#### 2.1.6 Employment status

- Employed  Self-employed  Unemployed  Full-time education  
 Pensioner  Caring for children under 16  Other - please specify below.

#### 2.1.7 Driving Licence number (if applicable - 18 characters as shown on your photocard)

#### 2.1.8 Are you a UK National only? (Please mark an X in the box)

#### 2.1.9 Are you a UK National and National of one or more other countries? Please mark an X in the box and list all other countries below)

#### 2.1.10 Are you a National of Non-UK countries only? (Please mark an X in the box and list all other countries below)

##### Nationality 1

##### Nationality 2

##### Nationality 3

##### Nationality 4

#### 2.1.11 Phone numbers

Home

Mobile

#### 2.1.12 Email



### 3 About the third party making a payment

Please only complete this section if a third party is paying

#### 3.1.1 Title

Mr  Mrs  Ms  Other:

#### 3.1.2 Surname

#### 3.1.3 First and other names in full

#### 3.1.4 Date of birth (DDMMYYYY)

#### Town of birth

#### 3.1.5 Country of birth

#### 3.1.6 Employment status

Employed  Self-employed  Unemployed  Full-time education  
 Pensioner  Caring for children under 16  Other - please specify below.

#### 3.1.7 Driving Licence number (if applicable - 18 characters as shown on your photocard)

#### 3.1.8 Your address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

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## 4 Contributions (to be completed by the payer)

The majority of minors are non-taxpayers. Non-taxpayers can currently contribute £2,880 to a pension in any one tax year and receive tax relief (£3,600 after tax relief). Please refer to the HMRC website for further information on pension tax relief and the annual allowance.

### 4.1 Regular contributions

#### 4.1.1 Please indicate who is currently making the regular payments into the Junior SIPP.

- Guardian  
 Third Party (please ensure section 3 is complete)

#### 4.1.2 Do you/they want to change the regular amount paid into the plan?

- No  
 Yes - what is the regular amount you want to pay into the plan? (min £50) £

#### 4.1.3 When would you/they like the regular contributions to be taken from your/their bank account?

- 10th **OR**  25th

Please allow twelve working days for us to set up the Regular Savings Plan.

Collections will then start on the next available payment date and follow the frequency selected.

If you or the third party are already making a regular contribution, then this instruction will replace that contribution

#### 4.1.4 How often would you/they like to make a payment?

- Monthly  Quarterly  Every 6 Months  Annually

#### 4.1.5 Do you/they want to change the bank account from which the regular contributions are taken?

- No  
 Yes - Please complete the attached Direct Debit form on the next page. We will then set up the regular contribution. ►

Please complete the Direct Debit form below. We will then set up the regular contribution.



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



Please fill in the whole form using a ballpoint pen and send to: Fidelity, PO Box 391, Tadworth, KT20 9FU.

**Name and full postal address of your bank or building society**

To: The Manager	Bank/building society
Address	
Postcode	

**Service User Number**

4	4	9	7	0	6
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**Name(s) of account holder(s)**

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**Bank/building society account number**

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**Branch sort code**

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**Reference**

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**Instruction to your bank or building society**

Please pay FIL SIPP Trustee (UK) Limited. 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 FIL SIPP Trustee (UK) Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s)	
Date	

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

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## 5 Investment choices – to be completed by the guardian

### 5.1 About investing the contributions

We will follow the investment instructions below, but where we cannot achieve this we will hold the money as cash within the account. This form is for investing into funds and cash only. Should you wish to invest in exchange traded investments, then please specify cash at this point. Then you can use our online service at [fidelity.co.uk](http://fidelity.co.uk) to make the investment later.

**Need help choosing funds?** We've developed a range of easy options to help you choose funds to put in the Fidelity SIPP. Take a look at the guidance section of our website at [fidelity.co.uk](http://fidelity.co.uk). The investment choices below will also be used to invest any existing regular contributions made into this account.

**IMPORTANT:** Please ensure you include the **fund code** as the fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at [fidelity.co.uk](http://fidelity.co.uk)

Should any of the new funds pay income, then income payments will be automatically reinvested on the account.

Fund code	Fund name	Regular contribution
<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"/> %
<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"/> %
<b>Amount to be paid into cash within my account</b>		<input type="text"/> %
<b>Totals should add up to 100%</b>		<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %

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## 6 Application summary

### 6.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I am the legal guardian of the Applicant; and the Applicant is under 18 years of age.
- I have been provided with and read:
  - the latest version of the Key Features Document
    - Doing Business with Fidelity incorporating the Fidelity Client Terms
  - the key information documents relevant to the chosen fund(s).
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- I confirm that I have not received advice from Fidelity in connection with this Regular Savings Plan amendment.

### Signature of legal guardian of the Applicant

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

#### Signature

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Date signed

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## 7 Your application summary (third party)

### 7.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I have been provided with and read:
  - the latest version of the Key Features Document
    - Doing Business with Fidelity incorporating the Fidelity Client Terms
  - the key information documents relevant to the chosen fund(s).
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- I confirm that I have not received advice from Fidelity in connection with this Regular Savings Plan amendment.

### Signature of third party

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

#### Signature



Date signed

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**Important: A Direct Debit Guarantee should be retained by the relevant payer.**

## 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, FIL SIPP Trustee (UK) Limited will notify you ten working days in advance of your account being debited or as otherwise agreed. If you request FIL SIPP Trustee (UK) Limited 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 FIL SIPP Trustee (UK) Limited 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 FIL SIPP Trustee (UK) Limited 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.