

The Fidelity SIPP

Junior SIPP top up form for making additional contributions to a Fidelity Junior SIPP

Use this form to:

- set up a Regular Savings Plan for a Fidelity Junior SIPP
- make additional single contribution(s) to a Fidelity Junior SIPP.

Don't use this form if:

- you haven't yet opened a Fidelity Junior SIPP
- you want to amend a Regular Savings Plan you already have on a 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.
- If you are making a single contribution by cheque, remember to attach the cheque(s) as per section 2.
- If you are making regular contributions, remember to complete and sign the Direct Debit Instruction in section 4.
- Read and sign the Declaration in section 6.

What's next?



Remove and keep this cover sheet and 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 set up the Regular Savings Plan and/or invested the additional contributions.



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 investments make sure you read the key information document which sets out key information about the investment 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 (DDMMYYYY)]

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 for NI number]

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 Employment status

Employed Self-employed Unemployed Full-time education
 Other - please specify below

[Grid for Other employment status]

1.1.10 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]

1.1.11 What is the Applicant's Fidelity SIPP account number?

[Grid for Fidelity SIPP account number]

For office use only

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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 Their details

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

House number/name

Street, city, county and country

Postcode

4 Contributions to the Junior SIPP (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 Contributions

We currently offer up to two regular contributions to a Junior SIPP account at the same time. One from the guardian and another from a third party. Any further instructions after this will replace the existing equivalent instruction.

Due to regulatory requirements we must obtain information about the source of contributions before we can accept an application

4.1.1 Source of this investment

Income from salary Divorce Settlement Sale of Property Inheritance
 Gift Sale of Investment/transfer Savings from income
 Other - please specify:

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4.2 Single contributions

4.2.1 Do you/they want to make a single contribution?

No - go to 4.3 Yes - what is the amount? £

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4.2.2 How do I/they make a payment?

Cheque/banker's draft - must be made payable to Fidelity and include the account holder's name. E.G. "Fidelity re: account holder's name". Cheques must be issued from a personal or a joint bank account in your/their name. Payments from other parties are not permitted. In addition, for banker's drafts and building society cheques, the reverse of the draft/cheque must contain the details of the original account debited including the full name, account number and sort code and must be endorsed with the bank's official stamp.

OR

Bank transfer (including faster payments) - please use the following details:

Bank:	BARCLAYS BANK PLC	Account number:	33039005
Account Name:	FIL SIPP TRUSTEE (UK) LIMITED DEPOSIT TRUSTEE ACCOUNT	Sort code:	20-93-32

Reference: **IMPORTANT:** Please ensure you/they provide the **SIPP ACCOUNT NUMBER** or the applicant's **NATIONAL INSURANCE NUMBER**, as the 'payment reference' when submitting the payment electronically.

This form must be received within five working days of the payment, otherwise monies will be returned to the payer's bank account. Please DO NOT use the bank details above to send a payment without completing and returning a form.

4.3 Regular contributions

4.3.1 Do you/they want to make regular contributions?

No - go to section 5
 Yes - what is the regular amount you/they want to pay into the plan? (min £50) £

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4.3.2 When would you/they like the regular contributions to be taken from 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.

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

Monthly Quarterly Every 6 Months Annually

Please complete the Direct Debit form on this page. We will then set up the regular contribution.

4 Contributions to the Junior SIPP (to be completed by the payer) (continued)



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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Reference

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Name(s) of account holder(s)

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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.

Bank/building society account number

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Branch sort code

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Signature(s)
Date

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

DD12

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 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 a Fidelity Junior SIPP. Take a look at the guidance section of our website at fidelity.co.uk

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. If you are starting a new regular contribution we will also use the investment choices below to invest any existing regular contributions to this account.

Should any of the new funds pay income, we will follow your existing preferences for income payments on your account.

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

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FILSIPPJunRSPTUprintP

6 Form 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 set-up and/or Junior SIPP top-up.

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



Date signed

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6.2 Tax Relief Declarations:

If the Applicant is under 16 year of age only declaration (1) should be signed (by the legal guardian of the Applicant). If the Applicant is 16 or 17, only declaration (2) should be signed (by the Applicant).

- (1) If the Applicant is under 16 years of age and if contributions are to be paid I, the legal guardian of the Applicant confirm that:
- a) the total of the contributions paid to the Fidelity Junior SIPP and to other registered pension schemes, on which the Applicant is entitled to tax relief, under Section 188 of Finance Act 2004, will not exceed, in any tax year, the basic amount (currently £3,600 gross. This means that you can make a maximum contribution of £2,880 as tax relief of £720 will be added.); or
 - b) the declaration in a) is correct, to the best of my knowledge and belief;
 - c) will give notice to the Scheme Administrator if an event occurs, as a result of which the Applicant will no longer be entitled to relief on contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
 - end of the tax year in which the event occurs;
 - and
 - 30 days of the event

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



Date signed

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- (2) If the Applicant is 16 or 17 years of age and if contributions are to be paid I, the Applicant, confirm that:
- a) I am under age 75 and a relevant UK individual under Section 189 of Finance Act 2004 and not a US person;
 - b) the total of the member contributions paid to my Fidelity Junior SIPP and to other registered pension schemes, on which I am entitled to tax relief, under Section 188 of Finance Act 2004, will not exceed, in any tax year, the higher of:
 - The basic amount (currently £3,600 gross. This means that you can make a maximum contribution of £2,880 as tax relief of £720 will be added.); or
 - 100% of my relevant UK earnings (as defined in Section 189 of Finance Act 2004 in the tax year);
 - c) the declaration in b) is correct, to the best of my knowledge and belief; and
 - d) I will give notice to the Scheme Administrator if an event occurs, as a result of which I will no longer be entitled to relief on your contributions, under section 188 of Finance Act 2004. I will give this notice by the later of:
 - end of the tax year in which the event occurs;
 - and
 - 30 days of the event

Signature of Applicant

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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7 Your application summary

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 set-up and/or Junior SIPP top-up.

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

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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.