

Member contributions form

Read this before you start

Please complete this form if you are going to make any contributions to your Essential SIPP.



Contributions details

Surname	
Forename(s)	
SIPP number	

Personal contributions

All relievable personal contributions must be made net of basic rate tax, which we will reclaim from HM Revenue and Customs and add to your Stadia Trustees Limited Essential SIPP. This can take up to 11 weeks.

Your contribution intentions, requested below, are for illustrative purposes only. Actual contributions may be greater or less. Please note that you are required to inform us in writing if you contribute in aggregate more than 100% of your earnings to this and any other pension scheme in a single tax year.

Under current pensions legislation, there are penalties if you, your employer and any other third party contribute together more than the annual allowance to all your pensions unless you can carry forward any annual allowance that you have not used from the previous three tax years. You must have been a member of a registered pension scheme in a tax year in which you are carrying forward any unused allowance. It will be your responsibility to calculate the amount available to carry forward and we will apply for tax relief on the full amount of any personal contributions you or any other third party make, other than your employer.

How much you intend to contribute

We will treat the amount(s) entered as net unless told otherwise

Net single contribution	£	
Net regular contribution	£	
Frequency	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half annually <input type="checkbox"/> Annually	
Preferred payment date <i>If a regular contribution is being made, please complete the SOM (Standing Order Mandate) which can be found on our website (www.essentialstipp.com)</i>	<input type="checkbox"/> 6th of month <input type="checkbox"/> 21st of month	
Expected start date <i>Please allow five working days before first payment</i>	/	/

Please note

Any contributions must be made via standing order, cheque or bank transfer (single contributions only)

Pension input period

The pension input period in which contributions made to all schemes is tested against the annual allowance. We suggest that you discuss this period with your financial adviser or accountant. The default period under the Stadia Trustees Limited Essential SIPP, which runs with the tax year, will apply unless you inform us otherwise.

Declaration

Check these details

I am a UK relevant individual*

Unlimited contributions can be made to your Stadia Trustees Limited Essential SIPP. However, only the amount of your total contributions to all pensions up to the higher of £3,600 gross or 100% of your UK taxable earnings will receive tax relief. Where the total contributions you and/or your employer paid to all pensions exceed the annual allowance, the relevant tax charges will apply.

***A UK relevant individual is one who:**

- has relevant UK earnings chargeable to income tax for that year
- is resident in the UK at some time during that tax year
- was resident in the UK at some time during the five years immediately prior to the tax year in question and was also resident in the UK when the individual joined the pension scheme
- has general earnings for that tax year from overseas Crown employment subject to UK tax, as defined by Section 28 of the Income Tax (Earnings and Pensions) Act 2003
- I confirm that my total gross contributions to all UK registered pension schemes for which I am entitled to tax relief will not exceed the higher of £3,600 or 100% of my UK relevant earnings.
- I accept that Stadia Trustees Limited is not responsible for checking whether I have applied, or intend to apply, for flexible drawdown before accepting contributions and applying for tax relief on personal contributions.

Important

As this application is also used as an application for tax relief at source, it is a serious offence to make false statements. The penalties are severe. False statements could lead to prosecution.

Sign and date here

Member's signature:

Date: