

## SIPP and Retirement Investment Account

### Additional contribution form



#### Online process available

The quickest way to submit this form is to complete it online. You can do this by heading to the 'clients' section via the dropdown menu in V2.0, choosing your client, clicking on the action menu on their SIPP and selecting 'additional contributions'.

This is an application form to pay an additional or one-off contribution, or to establish a regular monthly contribution to a SIPP or Retirement Investment Account by Direct Debit. If you want to change an existing regular contribution made by Direct Debit, you should either email us with your revised instruction at [contributions@investcentre.co.uk](mailto:contributions@investcentre.co.uk) or write to us at the address shown at the end of this form. Please do not complete this form.

If your employer is to pay regular contributions on your behalf, they must sign the Direct Debit instruction which must be made from a UK bank or building society account in the employer's name. If your employer wishes to amend the regular contribution, then we will require their written instruction to do so. Please do not complete this form.

If you are a legal guardian applying on behalf of a member under the age of 18, then please complete this form on behalf of the member and sign the declaration. We cannot process the contribution until this form is completed and signed.

If you would like to make a payment electronically, please ask your adviser to visit the AJ Bell Investcentre website and submit your request online. The relevant bank details and a unique payment reference will be provided as part of this process, removing the requirement for any paperwork to be submitted. Electronic payments also help to prevent any delays in funds being applied to your account.

The quickest way to submit this form is to complete it online. You can do this by heading to the 'clients' section via the dropdown menu in V2.0, choosing your client, clicking on the action menu on their SIPP and selecting 'additional contributions'.

You can also email a scanned copy, or post a completed copy to us. For scanned copies with cheque payments please use [contributions@investcentre.co.uk](mailto:contributions@investcentre.co.uk), and for electronic payments please use [cashapplications@investcentre.co.uk](mailto:cashapplications@investcentre.co.uk). Our postal address is **AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE**.

Please use **BLOCK CAPITALS** only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 83 99 060 or by email at [enquiry@investcentre.co.uk](mailto:enquiry@investcentre.co.uk).

## Checklist

### For single contributions

- ☐ Contribution by cheque (member)
- ☐ Contribution by cheque (employer)  
- see important note 4
- ☐ Single contribution by electronic transfer (member)
- ☐ Single contribution by electronic transfer (employer)
- ☐ Adviser charging variation and additional payment form (if applicable)

### For regular contributions

- ☐ Direct Debit (member) - see important note 3
- ☐ Direct Debit (employer) - see important note 3
- ☐ Adviser charging variation and additional payment form (if applicable)

## Important notes

1. All cheques must be made payable to 'AJ Bell Investcentre SIPP re (member name)' or 'AJ Bell Investcentre Retirement Investment Account re (member name)' e.g. AJ Bell Investcentre SIPP re John Smith.
2. We will only accept payments from a UK bank account.
3. Where a member or employer intends to pay regular contributions by Direct Debit, payments MUST be made from a UK bank or building society account. Please note that we do not accept regular electronic payments.
4. Single contributions paid by cheque by an employer must also be drawn on a UK bank or building society account in the employer's name.

## Personal information

Name of client

AJ Bell Investcentre account number

SCC

## Contributions

Please indicate the amount of contributions to be paid to your SIPP or Retirement Investment Account.

### Single contribution

Member (net) £

Employer (gross) £

### Regular contribution

Member (net) £ per month

Employer (gross) £ per month

## Member contribution

Please tick one or more of the following boxes to indicate which source member contributions are to be funded from.

☐ Income from employment ☐ Property sale

☐ Investment/savings ☐ Divorce settlement

☐ Inheritance ☐ Other

Member contributions are contributions paid by the member personally, or by someone else on their behalf, e.g. a parent, grandparent or spouse. They do not include employer contributions.

All member contributions are payable net of basic rate tax (20% for the 2024/25 tax year). We will reclaim basic rate tax from HM Revenue & Customs (HMRC) and credit it to the SIPP or Retirement Investment Account cash account. If you pay tax at a higher rate than basic rate you can claim any further tax relief to which you are entitled via self-assessment. Please note that if you are not the client named on the form but are paying a contribution on their behalf you will not be entitled to claim any further tax relief.

All employer contributions are payable gross. Where an employer intends to pay regular contributions by Direct Debit, payments MUST be made from a UK bank or building society account in the employer's name. Single contributions made by cheque must be drawn on a UK bank or building society account in the employer's name.

If your employer is to make contributions on your behalf, please advise your employer's name, head office address and postcode.

Employer's name

Registered address

Postcode

Company number

Is the employer listed on a recognised stock exchange?

☐

Yes

☐

No

## Declarations

I declare that, to the best of my knowledge and belief, the details provided in this form are correct, complete and not misleading and that the information provided in the application for my SIPP or Retirement Investment Account is still valid, except for any changes specifically advised to AJ Bell Investcentre.

I confirm that my adviser has provided me with sufficient information for me to understand the effect that this contribution will have on my SIPP or Retirement Investment Account.

Please sign and date this payment form and return it to **AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE**. Alternatively, you can email a scanned copy of the completed form to us – for cheque payments please use [contributions@investcentre.co.uk](mailto:contributions@investcentre.co.uk), and for electronic payments please use [cashapplications@investcentre.co.uk](mailto:cashapplications@investcentre.co.uk).

**I understand it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.**

If the client is under age 18 they are not permitted to sign this form.

Applicant's name

Date

Applicant's signature

Capacity in which signed (please tick)

☐

Adviser

☐

Client

☐

Parent/guardian

Please note that any adviser charges payable (if applicable) on the additional, single or regular contributions detailed in this form, will be calculated in line with the existing adviser charges levels currently in place on the SIPP or Retirement Investment Account, unless an adviser charging variation and additional payment form is filled in.