

# SIPP Dealing Account



0845 0700 720  
www.selftrade.co.uk

The Member, Trustee and Administrator (if different) must complete and sign this application form. If you wish to open an account on behalf of a minor, the person who will control the account should complete Section A. The Trustee and Administrator should complete Section D.

Please return your completed form in the envelope provided (no stamp is needed), alternatively post it to:  
Selftrade, Account Management, Boatman's House, 2 Selsdon Way, London E14 9LA.

On completion and submission of this form you will be subject to our Terms and Conditions.

## Section A Member's details you **must** complete all fields marked \* please use **CAPITALS**

<b>Selftrade account number</b> if applicable	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Title*</b>	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other title	<input type="text"/>	
<b>Surname*</b>	<input type="text"/>				<b>Any other surname</b> used in last 3 years	<input type="text"/>	
<b>Forenames*</b>	<input type="text"/>				<b>Member's Mother's maiden name*</b> for security purposes	<input type="text"/>	
<b>Permanent residential address*</b>	<input type="text"/>				<b>Date of birth*</b>	<input type="text" value="DD / MM / YYYY"/>	
<b>Postcode*</b>	<input type="text"/>				<b>Nationality*</b>	<input type="text"/>	
<b>Previous address*</b> if you have moved in the last 2 years	<input type="text"/>				<b>Daytime phone*</b>	<input type="text"/>	
<b>Postcode*</b>	<input type="text"/>				<b>Evening phone</b>	<input type="text"/>	
<b>Your National Insurance number*</b>	<b>Yes:</b> I have a National Insurance number <input type="checkbox"/> <b>No:</b> I declare that I do not have a National Insurance number <input type="checkbox"/> You <b>must</b> provide this or declare that you do not have one				Please enter it here	<input type="text"/>	
<b>Does your employer need copy contract notes?*</b> Yes <input type="checkbox"/> No <input type="checkbox"/>	We can provide <b>one</b> set of copy contract notes				<b>Address</b>	<input type="text"/>	
<b>Company name</b>	<input type="text"/>				<b>Postcode</b>	<input type="text"/>	
<b>Contact person</b>	<input type="text"/>						

## Section B Child's details (if applicable)

<b>Do you wish to open this account on behalf of a child?</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If <b>Yes</b> , please provide the Child's details:		
<b>Title</b>	Master <input type="checkbox"/>	Miss <input type="checkbox"/>
<b>Date of birth</b>	<input type="text" value="DD / MM / YYYY"/>	
<b>Surname</b>	<input type="text"/>	
<b>Forenames</b>	<input type="text"/>	

## Section C Trustee and Administrator's details

Trustee	Administrator (if different)
Name*	Name
Address*	Address
Postcode*	Postcode
Contact person(s)	Contact person(s)
Phone number*	Phone number
Email address	Email address
HM Revenue & Customs ref.*	The Trustee and Administrator of the assets may receive details of transactions and corporate actions. All assets will be held on behalf of the Trustee as the legal owner in LR Nominees Ltd and monies will only be accepted or remitted in accordance with the Trustee's and Administrator's instructions.
SIPP plan ref.*	
Scheme name	

## Section D Trustee and Administrator declaration

We confirm that we are the Trustee and Administrator acting on behalf of the member detailed in section A of this form. If applicable, we confirm that the account has been established in the name of the minor detailed in section B. We have understood and agree to be bound by the Terms and Conditions.

Trustee	Administrator
Signature(s)*	Signature(s)*
Name(s) and position*	Name(s) and position*
On behalf of*	On behalf of*
Date* DD / MM / YYYY	Date* DD / MM / YYYY

The Trustee should provide a copy of the annual return and certified copy of Certificate of Incorporation. Non-corporate Trustees may be required to provide evidence of identification before application is accepted.

## Section E Declaration

### Read and sign below

Please open a Selftrade SIPP Dealing account. I declare that the information on this application form submitted by me is true to the best of my belief. I have understood and agree to be bound by the Terms and Conditions. I accept that you may in your absolute discretion decline this application without reason being given. I acknowledge that Selftrade offers an execution-only investment service.

I declare that the Trustee and Administrator, detailed in section C of this form, will act respectively as the Trustee and Administrator of my SIPP and declare that I have undertaken to invest within HM Revenue & Customs regulations. I confirm that I have the necessary authorisation from the Trustee and Administrator to deal directly.

Signature*	Signature*
Date*	Date*

By becoming a client of Selftrade you consent to us holding and using information for the purposes set out in our Terms and Conditions. In accordance with the Terms and Conditions we may, from time to time, send you information regarding new products and promotions. If you would prefer not to be informed of these, please tick the box.

## Supporting documentation

For Child SIPPs, please include an original or certified copy of the child's birth certificate. See below for certified copy requirements.

### Existing customers

Please indicate your account number in Section A. You do not need to provide any supporting documentation.

### New customers

Please include supporting documentation as detailed below. Statements and bills **must** be originals **and** less than 3 months old. **Photocopies cannot be accepted.** We will return any original documents to you as soon as we have processed your application.

### UK residents:

**If you have been at your current address for more than two years and are on the current Electoral Roll**, please include **one** of the following:

- Gas, electricity or fixed line telephone bill. Mobile phone and internet utility bills cannot be accepted
- Bank statement. Internet bank statements cannot be accepted
- Credit card statement
- Local authority bill for the current year

**If you have been at your current address for less than two years**, please include **one** of the following:

- Gas, electricity or fixed line telephone bill. Mobile phone and internet utility bills cannot be accepted
  - Bank statement. Internet bank statements cannot be accepted
  - Credit card statement
  - Local authority bill for the current year,
- plus** one of the following:
- A current HM Revenue & Customs Tax Notification, **or**
  - Certified copy of your current UK driving licence, **or**
  - Certified copy of your current signed passport.

**The certified copies must be officially stamped and signed together with the following statement** 'certified as a true copy of the original' **by a UK lawyer, bank manager, or accountant. The person certifying your documents must give his/her full name, address and daytime telephone number.**

## If you are new to Selftrade, where did you hear about us?

Internet\*

Newspaper\*

Promotional code\*

\*Please give details

Magazine\*

Outdoor\*

Recommendation\*

Mailshot\*

Pension Administrator\*

Other\*

## Checklist

Member details

Ensure that you have completed all personal details including address, postcode, date of birth and National Insurance number.

Documentation

Ensure that you have provided any documentation as detailed in Section E to support your application.

Trustee

Ensure copies of Trustee's Identification, annual return and Certificate of Incorporation are enclosed (unless previously submitted).

Declaration

These sections must be read and signed by the parties.

## What to do now

Please send your application and supporting documentation to us using the enclosed reply-paid envelope. Alternatively post it to Selftrade, Account Management, Boatman's House, 2 Selsdon Way, London E14 9LA.

## What will happen next

### Existing customers

We will notify you when your account has been activated. Your existing account number and PIN will enable you to access your new account.

### New customers

We will send you a welcome pack with your account number and other information about using the service. We will send your PIN (Personal Identification Number) separately for security. We will also return your original supporting documentation under separate cover. If your application is unsuccessful we will return your documentation and cheque (if applicable).

