

# SIPP Manager – Appointment/change



## Completing this form

To appoint a SIPP Manager or amend an existing SIPP Manager authority, the **SIPP Member** should **complete Section B** and **sign Section A**. The **SIPP Manager** must be aged 18 or over and must **sign Section C**. The **SIPP Trustee** and **SIPP Administrator** must then **sign Section A**.

Please see Section D for definitions of all of the roles mentioned.

Once completed, please send this form and all related documents (such as evidence of identity) to:  
Account Management, Selftrade, Boatman’s House, 2 Selsdon Way, London. E14 9LA.

On acceptance of this application the SIPP Trustee, SIPP Administrator, SIPP Member and the SIPP Manager will each be subject to Selftrade’s Terms and Conditions (the “Terms and Conditions”).

You **must** complete all fields marked \* using **CAPITALS**.

## Section A Authorisation of the SIPP Manager

In respect of account number\*        with Selftrade (“the Account”),

the SIPP Trustee, SIPP Administrator and SIPP Member hereby authorise the person detailed in section B as their SIPP Manager to carry out online all actions which the SIPP Member can carry out online using the SIPP Member’s PIN (as our systems allow from time to time) in respect of the Account, including, but not limited to, giving instructions to buy, sell or otherwise deal in Investments, to exercise rights over, to convert, arrange, enter into and perform transactions using that Account, including sending and receiving communications to and from us by secure electronic message. The SIPP Manager is also authorised to carry out offline instructions for Investment dealing instructions only. The SIPP Manager may not (and has no authority to) give other offline instructions on behalf of the SIPP Member.

In authorising the SIPP Manager, the SIPP Trustee, SIPP Administrator and SIPP Member:

- authorise Selftrade to accept and act on all such orders and instructions received from the SIPP Manager relating to the Account.
- confirm agreement with all orders and instructions received by Selftrade from the SIPP Manager relating to the Account.
- agree that Selftrade will not be responsible for any losses, costs, liabilities or expenses incurred by you as a result of any dispute between you and the SIPP Manager in respect of any matter connected to the Account or any contradictory instructions or orders received from you and the SIPP Manager.

Notwithstanding the above authorisation of the SIPP Manager, the SIPP Member will continue to be able to give instructions and orders to us in accordance with our Terms and Conditions. In the event of any contradictory instructions or orders being received, we will be entitled to act on the instruction or order first received by us. The SIPP Member may cancel this SIPP Manager authorisation at any time by informing us in writing. Termination will take effect only once we have received the written instruction.

This SIPP Manager authorisation will become void on death of the SIPP Member. **Please also refer to the notes section.**

	SIPP Trustee	SIPP Administrator	SIPP Member
Name*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature(s)*	<input type="text" value="X"/>	<input type="text" value="X"/>	<input type="text" value="X"/>
Date*	<input type="text" value="DD / MM / YYYY"/>	<input type="text" value="DD / MM / YYYY"/>	<input type="text" value="DD / MM / YYYY"/>

## Section B SIPP Manager's details

<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"/>	<b>Other title</b>	<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>Permanent residential address*</b>	<input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/>				<b>Daytime phone*</b>	<input type="text"/>	
<b>Postcode</b>	<input type="text"/>				<b>Evening phone</b>	<input type="text"/>	
					<b>Mobile phone</b>	<input type="text"/>	
					<b>Email address*</b>	<input type="text"/>	

## Section C SIPP Manager's declaration

### Read and sign below

I declare that the information I have provided on this form is, to the best of my belief, true. I accept that you may in your absolute discretion decline this application without reason being given. I acknowledge that Selftrade provides an execution-only investment service. I confirm that I have received and agree to be bound by the Terms and Conditions as they apply to SIPP Members.

I agree:

- that Selftrade may use third party sources to verify my identity, including my home address details
- that I will comply with Selftrade's Terms and Conditions, all applicable laws, rules and regulations in exercising my authority hereunder including, without limitation, the Financial Services and Markets Act 2000
- that this authorisation constitutes the entire agreement between me and Selftrade in relation to the subject matter hereof
- to indemnify Selftrade, its agents and associated companies against any losses, costs, liabilities or expenses incurred by them, arising either by Selftrade or them arising directly or indirectly from any breach by me of this SIPP Manager authorisation.

Signature\*

X

Date

DD / MM / YYYY

**Please also refer to the notes section.**

## Section D Notes

**Account number and PIN:** No separate PIN or account number will be issued by Selftrade to the SIPP Manager. You are reminded that, notwithstanding any disclosure to the SIPP Manager of your account number, PIN or any other personal details, you are, and continue to be, responsible for the confidentiality and use of them. In the event you cancel this SIPP Manager authority you are reminded to change your PIN.

**Contract Notes and statements:** Contract notes, statements and other confirmations relating to this SIPP Dealing account will, in accordance with the Terms and Conditions, be sent to the SIPP Member (and not the SIPP Manager).

**Definitions:** In this form, 'SIPP Administrator' means the person(s) responsible for the maintenance and running of the SIPP; 'SIPP Manager' means the person appointed as such by the SIPP Trustee and the SIPP Member; 'SIPP Member' means the individual who has beneficial ownership of pension assets belonging to the SIPP in respect of whom the SIPP Trustee has opened the SIPP Dealing Account; and 'SIPP Trustee' means the person in whose name the SIPP Dealing Account is opened who is the legal owner of the assets in the SIPP, which it holds until benefits are paid out. 'We', 'Selftrade', 'us' and 'our' means Selftrade which is a trading name of Talos Securities Limited.

**Terms and conditions:** Selftrade's Terms and Conditions are available in the Important Information section of the website, [www.selftrade.co.uk](http://www.selftrade.co.uk). Printed copies are available on request.

### Supporting documentation required to verify the SIPP Manager's identity

#### Existing Selftrade customers (SIPP Manager)

If you already have an account in your own name with Selftrade, please enter your account number in Section B: no further documentation will be required.

#### Not a Selftrade customer (SIPP Manager)

Please include supporting documentation as detailed below. Statements and bills **must** be originals **and** less than 3 months old. **Photocopies cannot be accepted.** Personal data will be held and managed in accordance with Selftrade's Privacy Policy and all documentation will be returned to the SIPP Member once your application has been processed.

#### 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 and/or are not 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,

**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.

#### Non-UK residents:

Please provide proof of your address as shown above **AND** a copy of your passport that has been certified by the embassy, consulate or high commission of the country of issue, or by a lawyer. (Certifiers must provide their official stamp, full name and contact details).

**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.**

### 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.