THE SIMPLE INVESTMENT SIPP

APPLICATION FORM

The security and safety of your data is very important to London & Colonial. A copy of the London & Colonial Privacy Notice can be found on the website: www.londoncolonial.com/privacy-notice

LONDON & COLONIAL
INNOVATION IN PENSIONS

PART OF

STM GROUP PLC

To London & Colonial Services Limited (London & Colonial):

I hereby apply for the Simple Investment SIPP contract on the basis of the following information:

Please answer all questions in full.

1.1 Your Personal Details

Title:	(Mr/Mrs/Miss/Ms/Other)
Forename/s:	
Middle Name(s):	
Surname:	
Gender:	MALE / FEMALE
Permanent Residential Address:	
Town:	
County:	
Postcode/Country:	

If you wish us to use an alternative correspondence address please contact our Customer Relations Team: CustomerRelations@londoncolonial.com

How long have you lived at this address:	Years / Months *If less than three years, please provide details of previous three years' residency separately*
National Insurance Number*:	
Date of Birth:	Day / Month / Year
Intended Retirement Age**:	
Contact Tel Number:	
Email Address:	

**If you have lost or do not have a National Insurance number then please obtain one from UK HMRC here www.gov.uk/lost-national-insurance-number*

***We will assume a retirement age of 65 if field left blank*

1.2 Employment Status

EMPLOYED	CARING FOR ONE OR MORE PERSON AGED UNDER 16	CHILD (UNDER 16)	IN FULL-TIME EDUCATION
SELF-EMPLOYED	PENSIONER	CARING FOR A PERSON AGED 16 OR OVER	UNEMPLOYED
OTHER (PLEASE STATE)			

1.3 Tax Status

What country are you currently tax resident in?	
From What date	Day / Month / Year
Are you a USA citizen?	YES / NO
Have you ever been a USA tax resident?	YES / NO
Have you been a UK tax resident in the current tax year?	YES / NO
Have you ever been a UK resident for tax purposes?	YES / NO
Date became non-UK resident for tax purposes:	Day / Month / Year
Are you subject to Scottish Income Tax?	YES / NO

2.1 Financial Adviser Details

Please note we can only accept applications where a Financial Adviser has been appointed.

Adviser details (to be completed by your adviser):

Full Name Of Firm	
Name of Adviser	
Main Business Address	
Telephone	
Email	
Regulatory Body (e.g. FCA)	
Regulatory Body Authorisation Number:	

☐ Advice given which takes into account the suitability of both The Simple Investment SIPP and the underlying investment strategy. My/our client is following the advice given.

Signature	
	On behalf of the Financial Adviser
Print Name:	

Stamp If Available

2.2 Identity Verification

☐ I/we confirm and certify that the necessary evidence, as set out in the guidance notes issued by the Joint Money Laundering Steering Group (JMLSG), and/or Financial Action Task Force (FATF) to verify

Examples of acceptable documentary evidence for proof of Identity are as follows:

- Current signed passport
- Resident permit
- Current photo driving licence
- Current driving licence
- Firearms/shotgun certificate
- State pension or benefits payment book/notification letter
- Sub-contractors certificate
- Inland Revenue tax notification

I/we confirm and certify that we have verified the identity of the client and that we have:

- seen the original documents
- checked that any requiring a signature were pre-signed
- confirmed that any associated photograph of the client represents a true likeness of them, and;
- that dated copies of the documentary evidence used to verify the identity of the client have been retained by us and will, upon request, be made immediately available to London & Colonial, or our regulator

☐ (Please tick)

Examples of acceptable documentary evidence for proof of address are as follows:

- Utility bill *(mobile phone statements are not acceptable)*
- Bank statement *(internet printed bank statements are not acceptable)*
- Current photo driving licence
- Current driving licence
- Electoral roll check
- Recent mortgage statement
- Recent local authority tax bill
- Local authority rent card or tenancy agreement
- House/motor insurance certificate
- State pension or benefits payment book/notification letter
- Solicitor letter
- Home visit

I/we confirm and certify that we have verified the address of the client and that we have:

- seen the original documents dated within the last 3 months
- checked that any requiring a signature were pre-signed, and;
- that dated copies of the documentary evidence used to verify the address of the client have been retained by us and will, upon request, be made immediately available to London & Colonial, or our regulator

☐ (Please tick)

Signature	
	On behalf of the Financial Adviser

Print Name:	

3. Financial Adviser Remuneration

Please **only** complete this section if you wish to pay your adviser fee from your pension fund.

I wish to pay my adviser as detailed below. I confirm my adviser has provided me with their schedule of fees and I understand that the following fee(s) will be payable, the amounts are gross and include VAT where applicable.

From The Simple Investment SIPP

Initial:	%	AND/ OR	£
	(Based on the payments initially received and payable at outset)		
Annual:	%	AND/ OR	£
	(Payable annually in advance on each anniversary based on the fund value at the time)		
Additional Transfers:	%	AND/ OR	£
	(if applicable)		
Additional Single Contributions:	%	AND/ OR	£
	(if applicable)		

Initial remuneration is paid based upon the amounts initially received from the sources detailed in this application and are payable at outset.

Annual remuneration is payable (where applicable) based upon the fund value on or around the anniversary date.

Please Note: The above fees do not include the fees deducted by London & Colonial. Other investment charges made by an Investment Manager, Custodian or underlying fund charges are payable in addition.

4.1 Initial Investments

Please provide details of how much of the initial fund should be invested between the chosen Investment Providers. Please also confirm who will manage and make the investment trading decisions for the funds held with each chosen Investment Provider.

You are able to choose an Investment Provider from our panel of Investment Providers as detailed in Table A. Alternatively, you can choose an Investment Provider not listed on our panel by completing the details in Table B.

TABLE A — PANEL INVESTMENT PROVIDERS

INVESTMENT TYPE	INVESTMENT PROVIDER	INVESTMENT TRADER	PERCENTAGE ALLOCATION
UK Platform	Ascentric	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
UK Platform	AXA Elevate	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Investment Manager	Brewin Dolphin	☐ ☐ Investment Manager (complete 4.2)	%
UK Platform	Cofunds	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Investment Manager	Creechurch	☐ Investment Manager (complete 4.2)	%
UK Platform	James Brearley	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Offshore Bond	Old Mutual International	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
UK Platform	Platform One UK	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
International Platform	Platform One International	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%

4.1 Initial Investments (continued)

TABLE A — PANEL INVESTMENT PROVIDERS			
Offshore Bond	Prudential International	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Investment Manager	Quilter Cheviot	☐ Investment Manager (complete 4.2)	%
Investment Manager	Rowan Dartington	☐ Investment Manager (complete 4.2)	%
Offshore Bond	RL360	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Execution Only Stockbroker	Stocktrade	☐ Financial Adviser ☐ Investment Manager (complete 4.2) ☐ Client	%
Investment Manager	TAM Asset Management	☐ Investment Manager (complete 4.2)	%
UK Platform	Transact	☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
Investment Manager	Whitechurch Securities	☐ Investment Manager (complete 4.2)	%
		TABLE A - TOTAL ALLOCATION	**%**

If you wish to invest with a non-panel Investment Provider (Table B) or open multiple accounts with panel and/or non-panel Investment Providers then the Additional Investment Component annual fee will be applied in addition to the Core Component fee.

TABLE B — NON-PANEL INVESTMENT PROVIDERS			
INVESTMENT TYPE *(PLEASE TICK)*	**INVESTMENT PROVIDER**	**INVESTMENT TRADER** *(PLEASE TICK)*	**PERCENTAGE ALLOCATION**
☐ Offshore Bond ☐ Platform ☐ Execution only stockbroker ☐ Investment Manager ☐ Structured Product ☐ Structured Deposit		☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
☐ Offshore Bond ☐ Platform ☐ Execution only stockbroker ☐ Investment Manager ☐ Structured Product ☐ Structured Deposit		☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
☐ Offshore Bond ☐ Platform ☐ Execution only stockbroker ☐ Investment Manager ☐ Structured Product ☐ Structured Deposit		☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
☐ Offshore Bond ☐ Platform ☐ Execution only stockbroker ☐ Investment Manager ☐ Structured Product ☐ Structured Deposit		☐ Financial Adviser ☐ Investment Manager (complete 4.2)	%
		TABLE B - TOTAL ALLOCATION	**%**
		TABLE A + TABLE B - TOTAL ALLOCATION (MUST EQUAL 100%)	**%**

4.1 Initial Investments (continued)

Please send the investment application documents for your chosen Investment Provider to London & Colonial. Once received, we will complete the remainder of the investment application form and return it to your chosen Investment Provider.

Head Office Address: London & Colonial, Rockwood House, 9-17 Perrymount Road, Haywards Heath, West Sussex RH16 3TW, United Kingdom.

We will invest the maximum available (subject to liquidity requirements) with your chosen Investment Provider. Please contact us if you wish to amend amount to be invested. All investment payments to UK Investment Providers will be made by BACS transfer.

☐ Please tick here if you require same day payments to Investment Providers (additional charges may apply, see below).

All same day payments to non-UK Investment Providers will incur an additional bank payment charge. Please refer to our current Schedule of Fees for current banking charges, which can be seen here: http://www.londoncolonial.com/downloads

4.2 Investment Manager

Please confirm Investment Manager information (if applicable)

Investment Manager Individual Name		Investment Manager Individual Name	
Company Name		Company Name	
Authorisation Body *(e.g. FCA)*		Authorisation Body *(e.g. FCA)*	
Authorisation Number		Authorisation Number	
Correspondence Address		Correspondence Address	
Country		Country	
Postcode		Postcode	
Contact Email Address:		Contact Email Address:	
Contact Telephone Number:		Contact Telephone Number:	

The appointment of the Investment Manager will be subject to the agreement of London & Colonial.

4.3 Member Trader

If you wish to manage your own investments as a Member Trader please complete the following.

Before providing us with any investment or disinvestment instructions please tick the following boxes to confirm that you have received and read our;

☐ Permitted Investments Guidance Notes - Member Trading

☐ Permitted Investments Explanatory Notes

☐ The Permitted Investments List

4.4 Disinvestment Instruction

On occasion the cash held in the designated SIPP bank account may not be sufficient to meet the full amount of payments due from the Simple Investment SIPP. In order for us to be able to process an automatic payment of any pension income that may be due, or to make any other payments required, it may be necessary for us to disinvest from other liquid investments held within the Simple Investment SIPP in order to make such payment(s) possible. Liquid investments are normally held with one of the following Investment Custodians:

- Investment Manager
- Insurance Company
- Stockbroker
- Investment Platform/WRAP

Other investments that are normally held directly by London & Colonial as Trustee would not usually be considered liquid investments such as:

- Property
- Unquoted Shares
- Third Party Loans

The default disinvestment instruction will apply to those liquid investments held with an Investment Custodian. Please select one of the following options to confirm how we are to proceed should we need to disinvest.

Please also note that some of the options listed may incur additional charges, and that full details of these can be obtained from the Investment Custodian concerned.

All future disinvestments will be carried out on the basis selected, until you notify us in writing of a different basis.

We are able to change the Investment Custodian used for the disinvestment instruction at any time if you or your client request that we do so.

Please confirm Investment Custodian for disinvestment *(select one)*:

For all disinvestments we will ask the selected Investment Custodian to first use any cash that they hold in the account and then:

Please tick one only

☐ Disinvest equally across all investments
☐ Disinvest from largest investment
☐ Disinvest proportionally from each investment
☐ Not applicable – Request from Investment Manager

Please refer to our New Business Team for full details about the way in which we will apply the disinvestment instruction and how we will also apply a default instruction should one not be provided or no longer be valid at some point in the future.

5. Taking Benefits

I wish to take Benefits immediately: ◯ YES ◯ NO

If you have answered **Yes**, please complete the **Benefit Payment Form**.

6.1 Contribution Amount

CONTRIBUTION SOURCE	TYPE	FREQUENCY	AMOUNT	What next?
Personal (Your Account)	Single	☐ Ad hoc	£	Complete Section 6.2 "Source of Wealth"
	Regular	☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Annually	£	
Personal (deducted from salary)	Single	☐ Ad hoc	£	Complete Section 6.3 "Employer Details"
	Regular	☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Annually	£	
Employer	Single	☐ Ad hoc	£	Complete Section 6.3 "Employer Details"
	Regular	☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Annually	£	

Once your contribution has been received, we will allocate the funds for investment in accordance with your investment allocation % instruction contained in Section 6.4.

6.2 Source of Wealth for Personal Contributions (if applicable)

Anti-Money Laundering legislation now requires us to record the source of any personal contributions that are received. Please tick from the options below to confirm where the funds have been derived.

	SOURCE OF WEALTH	PLEASE TICK		SOURCE OF WEALTH	PLEASE TICK
1	Earnings	☐	7	Life Policy / Bond	☐
2	Savings	☐	8	Sale of Investments	☐
3	Lottery Win	☐	9	Sale of Property	☐
4	Divorce Settlement	☐	10	Gifts	☐
5	Inheritance	☐	11	Other*	☐
6	Company Sale / Profits	☐	*If "Other Please Specify:		

This is not intended to be an exhaustive list and London & Colonial reserves the right to request any further information and/or documentation we reasonably believe to be necessary.

6.3 Employer Details

(Only required if Employer or Employee contributions are being made)

Employer Contact Details

Employer Name:

Contact Name:

Contact Number: Contact Email:

Employer Declaration

I/We:

- Will deduct the necessary Employee contributions from the Applicant's salary after tax and National Insurance have been deducted as they become due and send this to London & Colonial.
- Understand that failure to provide information that prevents London & Colonial from monitoring the payment of contributions must be reported to The Pensions Regulator.
- Agree to pay the contributions detailed on the previous page until further notice and will inform London & Colonial of any changes to the amounts due.
- Agree to advise London & Colonial immediately if any member is to leave our employment. Unless otherwise agreed in writing, we confirm that Employer contributions will only be paid in respect of people currently employed and will cease if the member leaves employment.
- Understand that London & Colonial will aim to verify the identity of the company electronically to satisfy Anti-Money Laundering regulations. In the event that London & Colonial are unable to do this, they will request documentary evidence as an alternative. London & Colonial will delay applications until sufficient identification has been provided.
- The security and safety of your data is very important to London & Colonial. A copy of the London & Colonial Privacy Notice can be found on the website: www.londoncolonial.com/privacy-notice

Full Name:

Capacity:

Date: Day Month Year

Signed

6.4 Contribution Allocation

	INVESTMENT PROVIDER NAME	PERCENTAGE ALLOCATION
1		%
2		%
3		%
4		%
5	Cash (Trustee Bank Account*)	%
	Total Allocation (Must equal 100%):	%

***For details of the interest rates applicable to member's cash accounts please refer to our Interest Rate schedule available via our website www.londoncolonial.com/downloads.**

6.5 Money Purchase Annual Allowance (MPAA)

If you have taken an Uncrystallised Funds Pension Lump Sum (UFPLS) from any pension, or have converted from Capped/Flexible to Flexi-Access Drawdown since 06/04/2015, or have taken income from a pension in Flexi-Access Drawdown you will be subject to the Money Purchase Annual Allowance which restricts the total amount you can contribute to your pension. If you are unsure please consult your Financial Adviser.

Are you subject to the MPAA? ○ Yes ○ No

If yes, please confirm the date you became subject to the MPAA Date: Day Month Year

6.6 Payment Method

Once we have opened your SIPP, we will contact you (or your Employer) with our bank details in order for you (them) to arrange the contribution payment(s). Where regular contributions are being made you (your Employer) should contact your (their) bank in order to set up a regular payment.

Please note that we no longer accept contributions paid by cheque.

6.7 Start Date for Contributions

☐ ASAP OR Date Day Month Year

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7. Transfer Request Form

To: The Administrator of the Transferring Scheme or Policy

7.1 Transferring Scheme or Policy details

Scheme / Policy Name

Scheme / Policy Number

Estimated Transfer Value £

Administrator's Name

Address

Town / Postcode

Country

Telephone Number

Company Email Address

Country where pension is held

7.2 Scheme Type

- Occupational Money Purchase *(defined contribution including safeguarded benefits)**
- Occupational Money Purchase *(defined contribution)*
- Occupational Final Salary *(defined benefits)**
- Recognised Overseas Pension Scheme *(including Qualifying Recognised Overseas Pension Schemes)*
- Other UK Registered Pension Scheme

* *Please ask your Financial Adviser who has advised on this transfer to complete and sign* ***the Pension Transfer Advice Form****.*

7.3 Status of Transfer Value

- Uncrystallised
- Crystallised (please complete The Benefit Payment form)
- Partially Crystallised (please complete The Benefit Payment form)

7.4 Policyholder / Scheme Member

Full Name

Address

Postcode / Country

Date of Birth Day Month Year

National Insurance Nº

Transfer In-Specie? YES† NO

† *Please provide a list of assets separately*

7. Transfer Request Form (continued)

Declaration to the Administrator of the Transferring Scheme

I authorise London & Colonial to obtain information on my pension. I wish to transfer my entitlement under the above Scheme to the e Sunlight Account: A Personal Pension Plan (marketed as the "Simple Investment SIPP"), which is registered by HM Revenue & Customs under reference 00605757RN and ASCN A7001268C. I authorise and instruct you to transfer sums and assets from the Plan(s) as listed on this Transfer Request Form directly to London & Colonial Services Limited and to provide any instructions and/or discharge required by any relevant third party to do so.

Where you have asked me to give you any original policy document(s) in return for the transfer of sums and assets and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which arise as a result, and which any reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this Form or with respect to benefits from the Plan.

I authorise London & Colonial Services Limited and the current provider named in this Transfer Request Form to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to London & Colonial Services Limited.

I authorise London & Colonial Services Limited, the current provider, and any employer paying contributions to any of the Plan(s) as listed in this Transfer Request Form, to obtain from each other and release to each other, any information that may be required to enable the transfer of sums and assets to London & Colonial Services Limited.

Until this Application is accepted and complete, London & Colonial Services Limited's responsibility is limited to the return of the total payment(s) to the current provider(s).

Where the payment(s) made to London & Colonial Services Limited represent(s) all of the sums and assets under the Plan(s) listed in this Transfer Request Form, then payment made as requested will discharge the Administrator of the Transferring Scheme of all claims and responsibilities in respect of the Plan(s) listed.

Where the payment(s) made to London & Colonial Services Limited represent(s) part of the sums and assets under the Plan(s) listed in the Transfer Request Form, then the Administrator of the Transferring Scheme will be discharged of all claims and responsibilities only in respect of the part of the Plan(s) represented by the payment(s).

Declaration to London & Colonial Services Limited and the Administrator of the Transferring Scheme.

I promise to accept responsibility in respect of any claims, losses, and expenses that London & Colonial Services Limited and the current provider(s) may incur as a result of any incorrect information provided by me in this Application or of any failure on my part to comply with any aspect of this Application.

Signature		Date:	Day	Month	Year

PLEASE PHOTOCOPY THIS PAGE FOR ADDITIONAL TRANSFERS

8. Nomination Of Death Beneficiaries Form

You may request that any of your pension fund remaining on your death is payable to one or more persons. Please state each person's name and address in the first column and the desired percentage or proportion of your available fund in the fourth column. This nomination can be changed by submitting a replacement nomination form to us at any time.

If you wish benefits to be paid to children under age 18, it may be advisable for benefits to be paid from the Scheme into a trust for their benefit. You should discuss the establishment of a trust with your solicitor and enter the details of the trust below.

The security and safety of your data is very important to London & Colonial. A copy of the London & Colonial Privacy Notice can be found on the website: www.londoncolonial.com/privacy-notice

In the event of my death I would like any sums payable under the Simple Investment SIPP to be paid to the following person or persons in the manner shown below.

I understand that in exercising your discretion in the disposal of the benefits you will not be bound by my nominations but you will bear them in mind.

	Full name and address of beneficiary *(if under age 18, please input trust details)*	Date of birth	Contact number and/or email	%
1				
2				
3				
4				
5				
6				
7				
			Total: *(Must add up to 100%):*	

Signature

Date: Day Month Year

We recommend that you review your nomination(s) regularly, particularly if either your circumstances, or those of your beneficiaries, change. Upon notification of your death, we will refer to the most recent signed nomination received by us.

9. Declarations

If my application is accepted, I undertake to be bound by and comply with the Trust Deed and Rules of the Sunlight Account: A Personal Pension Plan; Schedule of Fees and the Permitted Investments List for The Simple Investment SIPP; as amended from time to time.

If I have appointed a Financial Adviser in Section 2.1 I give my authority for London & Colonial to accept investment and disinvestment instructions from them and to pay adviser fees to them as detailed in this application form.

If I have appointed an Investment Manager in Section 4.2, I give my authority for London & Colonial to accept investment and disinvestment instructions from them.

I acknowledge that the total contributions to all registered pension schemes to which I am entitled to tax relief will not exceed the higher of:

1. £3,600

   Or

2. 100% of my Relevant UK Earnings for that tax year, but not exceeding the Annual Allowance for that tax year.

(Your Relevant UK Earnings are generally your earnings subject to UK Income Tax).

I agree that I will inform London & Colonial if an event occurs as a result of which I will no longer be entitled to relief for my contributions. I will inform London & Colonial of such an event no later than:

1. The 5 April in the tax year in which the event referred to occurs; and
2. 30 days after the occurrence of the relevant event.

I agree that I will inform London & Colonial within 30 days in writing if:

1. There is a change in my residency status;
2. There is any change in my name or permanent residential address.

I consent to London & Colonial using any personal information supplied on this application or obtained from any third party to be used for the administration of the Simple Investment SIPP.

I authorise London & Colonial to pass my personal information to:

1. Any professional financial or investment adviser(s) which I have nominated on this application form or in any associated correspondence; and
2. Any necessary third party in connection with administering the Simple Investment SIPP
3. Any regulatory authorities or to any other third parties under pensions regulations and/or to comply with any other legal requirements
4. Other companies within STM Group Plc

I consent to London & Colonial providing any relevant information related to the Simple Investment SIPP to any other pension scheme trustees, administrators, practitioners, insurers or pension providers when required to do so.

I consent to London & Colonial performing electronic searches on me to verify my identity for Anti-Money Laundering purposes as and when may be required.

I request and consent to the payment of the transfer value(s) from my previous scheme(s), as indicated on Section 7 to the Simple Investment SIPP. I understand that after such payment neither I nor my spouse, civil partner or dependants will have any entitlement to benefits under the scheme(s) indicated in Section 7 to which the transfer payment relates.

I am satisfied that the Simple Investment SIPP is suitable for my requirements and apart from the factual information relating directly to the Simple Investment SIPP, I have not sought or been given advice from London & Colonial.

I agree that London & Colonial has no liability to me with regards to the suitability of the Simple Investment SIPP in my circumstances or with regards to the suitability of or risks associated with any investments that I, my Financial Adviser or Investment Manager request to be made by me or on my behalf.

I acknowledge that London & Colonial have the right to refuse to proceed with any investment instructions made by me or by my appointed Financial Adviser or appointed Investment Manager from time to time.

I acknowledge that I will be responsible for any, claims, losses, costs, charges or expenses which may be raised against London & Colonial or incurred by London & Colonial in consequence of London & Colonial acting on instructions received by facsimile or email from the address stated on this application form and/or provided by me, my appointed Financial Adviser, or appointed Investment Manager acting on my instruction.

Email is not a secure method of communication and confidential or sensitive information will not be transmitted in this format by London & Colonial unless you agree otherwise.

These statements apply to the details contained in this form, to any other information provided in association with this Application and to any data which London & Colonial creates, receives or processes in the future in relation to the Simple Investment SIPP.

Whether or not you become a member of the Scheme, the security and safety of your data is very important to London & Colonial. A copy of the London & Colonial Privacy Notice can be found on the website: www.londoncolonial.com/privacy-notice

To the best of my knowledge, the particulars including my basic personal information and declarations made in this application are correct and complete.

To be signed by the Member or the Member's Attorney:

(If being signed by an attorney please enclose the appropriate Power of Attorney):

Signature		Print Name:	
		Date:	Day / Month / Year

London & Colonial
Innovation In Pensions

PART OF STM GROUP PLC

For more information please contact:
t: +44 (0)203 479 5505
w: www.londoncolonial.com
e: CustomerRelations@londoncolonial.com