

1. Your Details

Members Name _____

C&P SIPP Member No _____

Date of birth

d	d	m	m	y	y	y	y
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 NI number

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2. Appointment of Investment Manager

Company _____

Address _____

Postcode _____

Investment Managers name _____

Telephone Number _____

3. Appointment of Financial Adviser

Was financial advice given? yes no

Company _____

Address _____

Postcode _____

Financial Advisers name _____

Telephone Number _____

Advice remuneration Is your Adviser to receive remuneration by deduction from your pension fund?
 yes – please complete full details below no

Initial / Set -up fee £ _____ and / or _____ % of fund value

Ongoing advice £ _____ and / or _____ % of fund value

Timing of Ongoing payment Annual fee to be deducted at start of policy, and each subsequent anniversary
 Annual fee to be deducted at first anniversary and each subsequent anniversary

Member Declaration for Adviser Remuneration

- I understand that all correspondence relating to The C&P SIPP, including details of any charges deducted, will be forwarded to my Financial Adviser as detailed above
- I agree to pay my Adviser the charges detailed above and request that CPPL pay them on my behalf from the funds held within THE C&P SIPP, until further notice, upon receipt of the appropriate invoice from my Financial Adviser
- I understand that these charges may include VAT and agree that VAT may be added where applicable
- I understand that the charges due to my adviser are in addition to the CPPL charges due on my SIPP as detailed on the Charges Schedule

Members signature _____ Date _____