

1. Your Details

Members Name
C&P SIPP Member No
Date of birth (d d m m y y y y) NI number

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