

1. Your Details

Members Name
C&P SIPP Member No
Date of birth
NI number

2. Appointment of Investment Manager

Company
Address
Postcode
Investment Managers name
Telephone Number

3. Appointment of Financial Adviser

Was financial advice given?
Company
Address
Postcode
Financial Advisers name
Telephone Number
Advice remuneration
Initial / Set -up fee
Ongoing advice
Timing of Ongoing payment

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