

# Alliance Trust Full SIPP

## Adviser remuneration details form

Please complete in block capitals and black ink.

Member's name

### 1 Adviser remuneration

	Non Protected Rights Fund (See note 1)	Protected Rights Fund (See note 5)
Initial (one-off) payment	£ <input type="text"/>	£ <input type="text"/>
	AND/OR <input type="text"/> %	AND/OR <input type="text"/> %
	of transfer payment(s) for the member (See note 2)	of transfer payment(s) for the member (See note 2)
	AND/OR <input type="text"/> %	
	of gross contribution(s) for the member (See note 3)	

	Non Protected Rights Fund	Protected Rights Fund (See note 5)
Renewal (annual) payments (See note 4)	£ <input type="text"/>	£ <input type="text"/>
	AND/OR <input type="text"/> %	AND/OR <input type="text"/> %
	of the total fund value for the member at the renewal date	of the total fund value for the member at the renewal date
	AND/OR <input type="text"/> %	AND/OR <input type="text"/> %
	of the value of specific investments as detailed below	of the value of specific investments as detailed below
	<b>Investments on which adviser remuneration to be paid</b>	<b>Investments on which adviser remuneration to be paid</b>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

- Notes**
- The adviser's company becomes entitled to this payment when the member's SIPP application has been accepted. The payment will be made to the adviser's company as soon as practicable after there are sufficient liquid assets in the pension fund.
  - The adviser's company becomes entitled to this payment when the transfer value has been requested. The payment will be made to the adviser's company as soon as practicable after the transfer payment has been received.
  - The adviser's company becomes entitled to this payment when the contribution has been made. The payment will be made to the adviser's company as soon as practicable after the contribution has been made, even though the tax relief due on the contribution will not necessarily have been received.
  - The adviser's company becomes entitled to this payment on the annual renewal date and the payment will be made to the adviser's company as soon as practicable after the annual renewal date and there are sufficient liquid assets in the pension fund. All annual renewal payments will be treated as being made in arrears.
  - It is not possible to make payments from the protected rights fund in relation to work done on the non-protected rights fund.

## 2 Adviser



Contact name	<input type="text"/>	Company address	<input type="text"/>
Company name	<input type="text"/>		<input type="text"/>
			<input type="text"/>
		Postcode	<input type="text"/>
Adviser account name	<input type="text"/>	Adviser account reference	<input type="text"/>
Adviser account number	<input type="text"/>	Adviser sort code	<input type="text"/>

## 3 Confirmation to Alliance Trust Savings and signature



I have appointed the adviser named above to work on my behalf in relation to my Full SIPP. I have carefully read the Adviser Remuneration details set out overleaf and confirm that they are acceptable to me.

In consideration of the work which the adviser's company has undertaken and, where appropriate, will undertake, on my behalf, I hereby request Cater Allen Private Bank and Alliance Trust Savings Limited to pay the amount(s) shown above from my pension fund to the adviser's company as and when required.

### I understand that:

This arrangement will remain in place unless I notify Alliance Trust Savings Limited in writing that I wish to amend or terminate it; and

No such amendment or termination will have retrospective effect and any renewal (annual) payments due, as defined above, will be calculated on a pro rata basis.

Any amounts paid in accordance with this agreement will not include any allowance for VAT unless an adviser's invoice with allowance for VAT is submitted.

Member's name	<input type="text"/>
Member's signature	<input type="text"/>

Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
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