



If you have any questions, please
call our Client Services Team on

01382 573737

Select SIPP

Employer contributions consent form

Please read the Important notes to employers overleaf before completing this form

Please complete in block capitals and black ink.

1 Employee details



Alliance Trust Savings Client Reference Number (if known)	<input type="text"/>	Permanent residential address	<input type="text"/>
Title	<input type="text"/>		<input type="text"/>
Surname	<input type="text"/>		<input type="text"/>
Forenames	<input type="text"/>	Postcode	<input type="text"/>
National Insurance Number	<input type="text"/>		

2 Employer's details



Employer name	<input type="text"/>	Employer address	<input type="text"/>
Employer contact	<input type="text"/>		<input type="text"/>
Phone number	<input type="text"/>		<input type="text"/>
		Postcode	<input type="text"/>
Email address	<input type="text"/>		

3 Employer's declaration



I/We, the employer of the individual named above, agree to contribute to the Select SIPP in respect of the above named employee as follows:

Lump sum payments by cheque

Amount	£ <input type="text"/>	(minimum £50)	Please make cheques payable to Alliance Trust Savings Limited
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Regular payments by Direct Debit

Amount	£ <input type="text"/>	(minimum £50)	
Collect on this day of the month (Tick one box only)	1st <input type="checkbox"/>	8th <input type="checkbox"/>	Commencing in (month/year)
	15th <input type="checkbox"/>	22nd <input type="checkbox"/>	Collection
			MM <input type="text"/>
			YYYY <input type="text"/>
Please make sure you complete section 5. Please tick this box to confirm you have done this.	<input type="checkbox"/>		Direct Debits will be automatically collected on a monthly basis. If you wish Direct Debits to be collected quarterly, please tick. <input type="checkbox"/>

Please remember to allow at least 10 working days before the first collection is due to be paid to allow your bank time to set up the Direct Debit.

4 Employer's signature



Name of person signing	<input type="text"/>	Position	<input type="text"/>		
Signature	<input type="text" value="X"/>	Date	<input type="text" value="DD"/>	<input type="text" value="MM"/>	<input type="text" value="YYYY"/>

Important notes to employers

Employers making contributions to the personal pensions of their employees have statutory duties under the relevant pensions legislation. Please read our Guide for Employers available in the literature centre of our website or by calling our Client Services Team on 01382 573737 and note the following:

Where the employer is deducting the employee's own contribution from the employee's pay and paying it over to the pension provider, the payment must be received by the provider no later than the 19th day following the month in which the payment is deducted.

Where the employer is making a contribution out of its own resources to the employee's pension, the payment must be received by the pension provider by the due date agreed with the employee. This does apply in the case of the Select SIPP and all employers should be aware of their statutory responsibilities which are summarised below:

You have a duty under pensions legislation to prepare, maintain and from time to time revise a record of the payments you have agreed to make to the Select SIPP, showing the rate of contribution and the due date. You also have a duty to send us a copy of this record.

You need to consider whether the information on the form overleaf is a complete record of all the payments you have agreed to make to your employee's Select SIPP. If it is not you must prepare and complete a separate record of payments. You must send us a copy of this document. For example, you may be sending a cheque now, but if you have already agreed with the employee that you will make other lump sum payments later in the year, you have a statutory duty to tell us now what these agreed payments are and when they are due. If you have agreed now that you will increase your Direct Debit later, you must tell us now in writing what the increased Direct Debit will be and when it will take effect.

If you consider that the information on the form overleaf is a record of all the payments you have agreed to make to your employee's Select SIPP (by cheque and/or Direct Debit) you should still consider your obligations under the pensions legislation and decide whether you need to submit to us a separate record of payments (which we suggest you do).

You must make sure we receive the contributions as agreed (in the case of Direct Debits we make the collection but you must make sure there are funds in the account).

For the avoidance of doubt, employer contributions can always be revised in the future and at that time you must let us know what revisions have been agreed by submitting a record of payments to us.

Employers making contributions to the Select SIPP must be aware that we have a duty to report you to the Pensions Regulator if you do not make contributions to the Select SIPP by the due date. The Pensions Regulator encourages us also to report any failure to supply us with a complete payment record. In some cases we have a duty to report your failure to the employee. This is the case even though the Select SIPP is a personal pension and not an occupational pension scheme.

Employers will be notified of contributions received from them, but will not be consulted or informed of the level of personal contributions or investments made within the Account. The Select SIPP is personal to the employee.

All communications to the employer will identify the employee by name and National Insurance Number.

Our Select SIPP Guide for Employers, is available to download from our website, www.alliancetrust.co.uk or by calling our Client Services Team on 01382 573737. Otherwise a Guide will be sent to you when this form is acknowledged.



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Alliance Trust Savings Limited PO Box 164, 8 West Marketgait, Dundee DD1 9YP

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5 Direct Debit Instruction



Instruction to your bank or building society to pay by Direct Debit



Please fill in the whole form and return it to:

Alliance Trust Savings Limited, PO Box 164, 8 West Marketgait, Dundee DD1 9YP

Ref number (Alliance Trust use only)	<input type="text"/>	Originator's ID number	<input type="text" value="8"/> <input type="text" value="0"/> <input type="text" value="7"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="1"/>
Full name	<input type="text"/>	Name(s) of account holder(s)	<input type="text"/>
Name and full postal address of your bank or building society	<input type="text"/>	Branch sort code	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<input type="text"/>	Bank or building society account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/>		

Direct Debit instruction

Please pay Alliance Trust Savings Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Alliance Trust Savings Limited and, if so, details will be passed on electronically to my bank/building society.

Signature(s)	<input type="text" value="X"/>	Date	<input type="text" value="DD"/> <input type="text" value="MM"/> <input type="text" value="YYYY"/>
	<input type="text" value="X"/>	Date	<input type="text" value="DD"/> <input type="text" value="MM"/> <input type="text" value="YYYY"/>

Banks and building societies may not accept Direct Debit instructions for some types of account.



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ALLIANCE TRUST ASSET MANAGEMENT

ALLIANCE TRUST PLC

ALLIANCE TRUST SAVINGS

Alliance Trust Savings Limited is registered in Scotland No. SC98767; registered office, PO Box 164, 8 West Marketgait, Dundee DD1 9YP; is authorised and regulated by the Financial Services Authority whose address is 25 The North Colonnade, Canary Wharf, London E14 5HS firm reference number 116115; gives no financial or investment advice. 09-184 (June 2009)



Direct Debit guarantee

This guarantee should be detached and retained by the payer.



- This guarantee is offered by all banks and building societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own bank or building society.
- If the amounts to be paid or the payment dates change, Alliance Trust Savings will notify you 10 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Alliance Trust Savings or your bank or building society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time, by writing to your bank or building society. Please also send a copy of your letter to us.