

Details of Yorsipp Member

Member Name:

Member Number:

Details of Adviser

Name of Financial
Adviser:

Name of Regulated
Firm:

FCA Number:

Remuneration

Please indicate whether this is an ad hoc fee for a standalone advice matter or whether this is to replace the existing remuneration agreement as detailed on the SIPP application

Initial Fee Fixed

£

or % of SIPP Fund

%

Ongoing Fee Fixed

£

per annum or % of SIPP fund value

%

per annum

Please note ongoing fees are paid annually only

Where you require remuneration on future transfers or contributions, these should be confirmed at the time of a future transfer or contribution and should be confirmed in writing by the Yorsipp member.

Continued Overleaf...

Bank Details of Regulated Firm

Sortcode:

Account Number:

Account Name:

Payment Reference:

Adviser Signature & Declaration

I declare by signing below that this fee is being charged in accordance within our firm's normal charging structure and meets all regulatory requirements. I confirm this payment relates to advice provided to the Yorsipp member regarding the member's SIPP.

Name of Adviser:

Adviser Signature:

Date:

Member Signature & Declaration

I declare by signing below that this fee is in accordance with advice I have received regarding my SIPP. I do not deem this fee to be excessive and I authorise Yorsipp to deduct the fee from my SIPP.

Member's Name:

Member's Signature:

Date:



PENSION ADMINISTRATORS

Eadie House, 74 Kirkintilloch Road, Bishopbriggs, Glasgow G64 2AH

Tel 0141 772 3365 Fax 0141 762 1862

All calls are recorded for quality, monitoring, training and fact verification purposes.

Email: info@yorsipp.com

Web: www.yorsipp.com

Registered Office: c/o Calvert Dawson Ltd., 288 Oxford Road, Gomersal, Cleckheaton BD19 4PY Registration number 05743279

Yorsipp Limited is authorised and regulated by the Financial Conduct Authority