

Change of Address Form for SIPP Updating Your Address Details

Please use this form if you have moved or are about to move house, and return it to Curtis Banks at the above address.

1 Your current/old details

Plan number	<input type="text"/>
Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode

2 Your new details

Address	<input type="text"/>	
	Country	Postcode
Home telephone	<input type="text"/>	<input type="text"/>
Mobile telephone	<input type="text"/>	<input type="text"/>
Work telephone	<input type="text"/>	<input type="text"/>
Email	<input type="text"/>	

3 Declaration

Please note my change of address to commence (please tick or complete date as appropriate):

With immediate effect

From a specific date Date

Eligibility

Please indicate below which of the following apply to you:

- 1 I am a UK relevant individual**
 A UK relevant individual is one who:
- has relevant UK earnings chargeable to income tax for that year;
 - is resident in the UK at some time during that tax year;
 - was resident in the UK at some time during the five years immediately before the tax year in question and was also resident in the UK when the individual joined the pension scheme;
 - has general earnings for that tax year from overseas Crown employment subject to UK tax (as defined by Section 28 of the Income Tax (Earnings and Pensions) Act 2003).
- 2 I am a non relevant individual who was a UK resident or had earnings chargeable to UK tax in the last five years**
 You are entitled to receive tax relief on contributions.
- 3 I am a non UK individual**
 You are entitled to contribute any amount, but you will not be entitled to receive any tax relief on your contributions.

3 Declaration (continued)

Investor Declaration

I will inform the scheme administrator in writing (within 30 days) if:

- I cease to be a UK resident or change my country of residency;
- I contribute on aggregate more than 100% of my earnings to this and any other pensions scheme in any tax year;
- I cease to have UK relevant earnings;
- I begin to have UK relevant earnings again;
- There is a change in my employment status;
- There is a change in my permanent residential address.

Investor's signature

Date

Curtis Banks Limited, T 0117 910 7910
3 Temple Quay, F 0117 929 2514
Bristol, BS1 6DZ
curtisbanks.co.uk

This document shall be governed by and construed in accordance with the laws of England & Wales. It is based on our current understanding of regulations and can be subject to change as legislation may change over time.

Call charges will vary. We may monitor and record calls.

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

Curtis Banks Limited (registered number 6758825) is a company registered in England & Wales with their registered address at 3 Temple Quay, Bristol, BS1 6DZ.
Curtis Banks Limited is authorised and regulated by the Financial Conduct Authority. CHANGEADD 1018

