

GUIDANCE NOTE

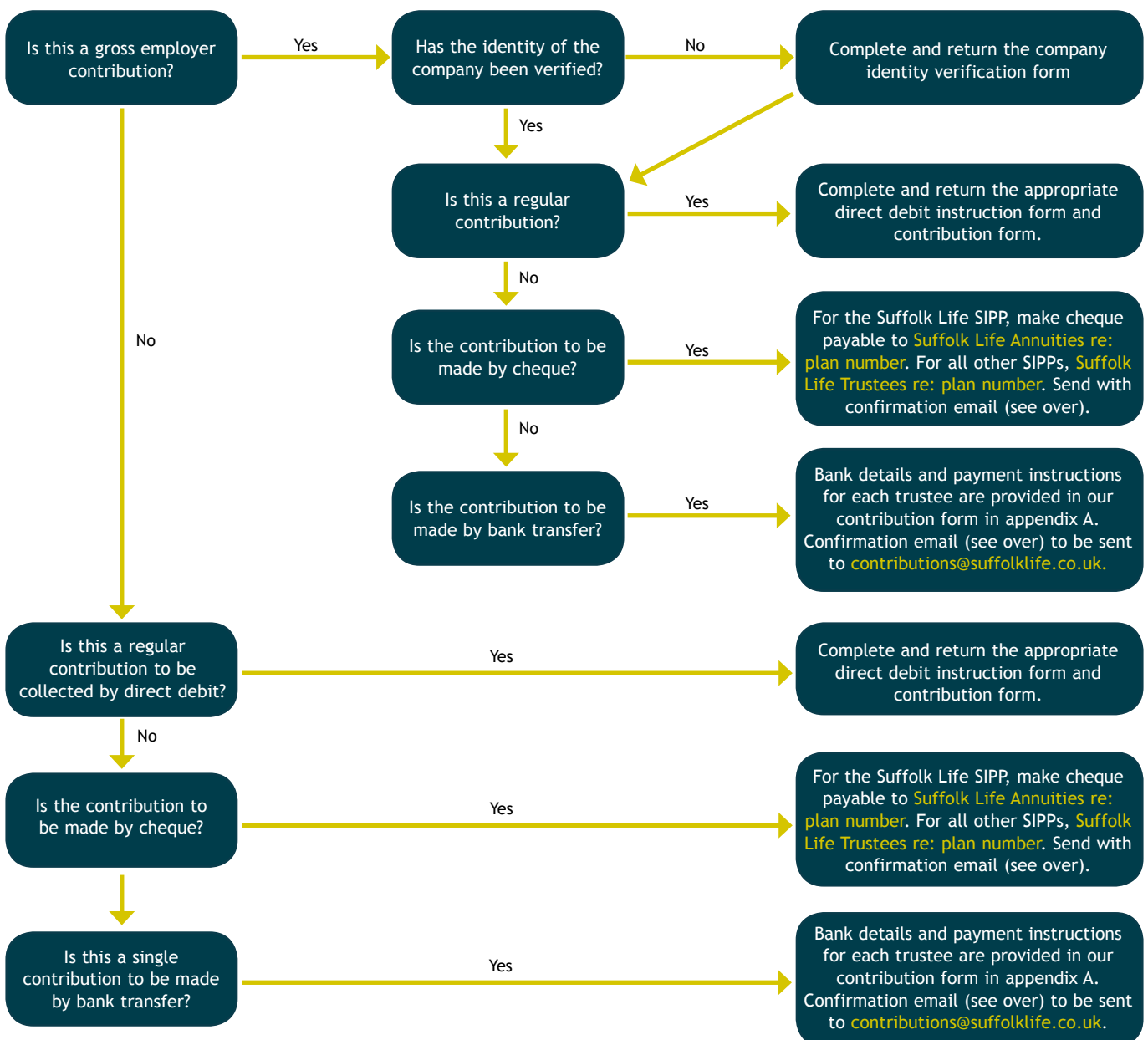
MAKING CONTRIBUTIONS

APPROVED FOR CLIENT USE | JUNE 2021



A guide to making contributions into a Curtis Banks plan.

For use with Your Future SIPP, Suffolk Life MasterSIPP, SimSIPP, SmartSIPP and Suffolk Life SIPP.



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CONTINUED

Contribution details

Please provide the below information for your contribution. This applies to contributions received by cheque and bank transfer. Alternatively, please complete our Contribution form which is available on our website.

- Plan number the payment is in reference to;
- Amount of contribution;
- If it is personal net or employer gross;
- For an employer contribution, if anti-money laundering information has been received - if not, please provide before sending payment;
- Date expected to be received at Curtis Banks;
- If the contribution will be sent as more than one payment;
- If the contribution is to be paid to an investment account and, if so, which one;
- Where the tax reclaim will be sent to; and
- Whether the money purchase annual allowance has been triggered.

This information needs to be emailed to: contributions@suffolklife.co.uk.

Important points to consider

The value of pension funds may fall as well as rise. Your money is tied up until you take your benefits. Benefits can generally be taken any time after age 55.

Contact Details

If you'd like to speak to us about anything in this guidance note, please contact us on:

T 01473 296 969

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

E sippsupportteam@curtisbanks.co.uk

Please remember not to send any personal, financial or banking information via email as it is not a secure method of communication.