

GUIDANCE NOTE

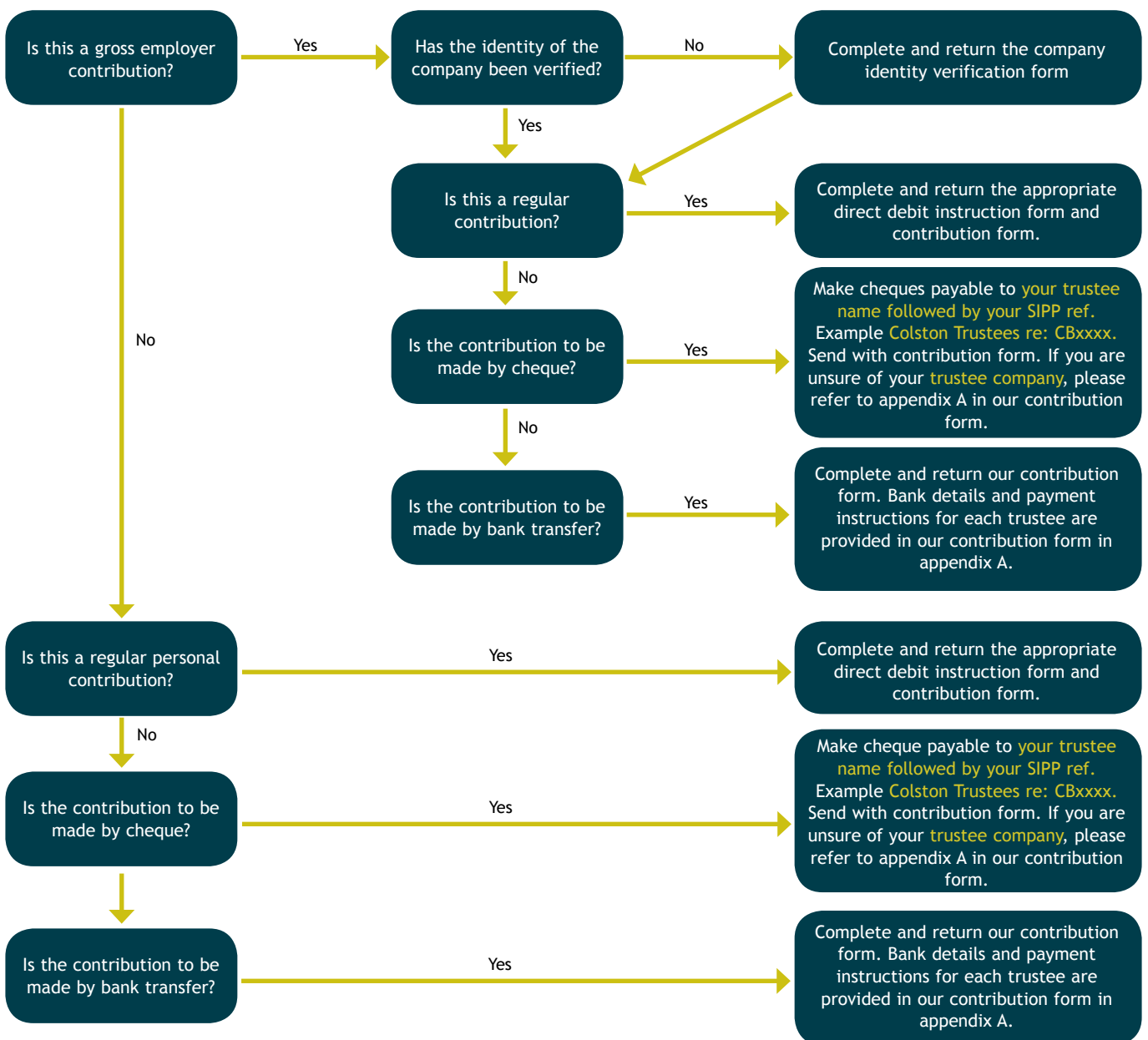
MAKING CONTRIBUTIONS

APPROVED FOR CLIENT USE | JANUARY 2022



A guide to making contributions into a Curtis Banks plan.

For use with all Curtis Banks plans excluding Your Future SIPP, Suffolk Life MasterSIPP, SimSIPP, SmartSIPP and Suffolk Life SIPP.



CONTINUED

Contribution details

If the contribution is to be sent via bank transfer to the SIPP bank account rather than a cheque, we'll need to know the following:

- Plan number the payment is in reference to;
- Amount of contribution;
- If it is a personal net or an employer gross contribution;
- For an employer contribution, contribution form or letter on headed paper signed by appropriate person (Finance Director, Accountant);
- 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;
- Whether the money purchase annual allowance has been triggered; and
- Do you hold enhanced or fixed protection.

This information needs to be completed on our contribution form and the form then needs to be sent to us via our secure messaging system or a completed contribution form sent to our Bristol office.

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, although this is due to increase to 57 in 2028.

Contact Details

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

T 0117 332 4080

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

E cashmanagement@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.