

GUIDANCE NOTE

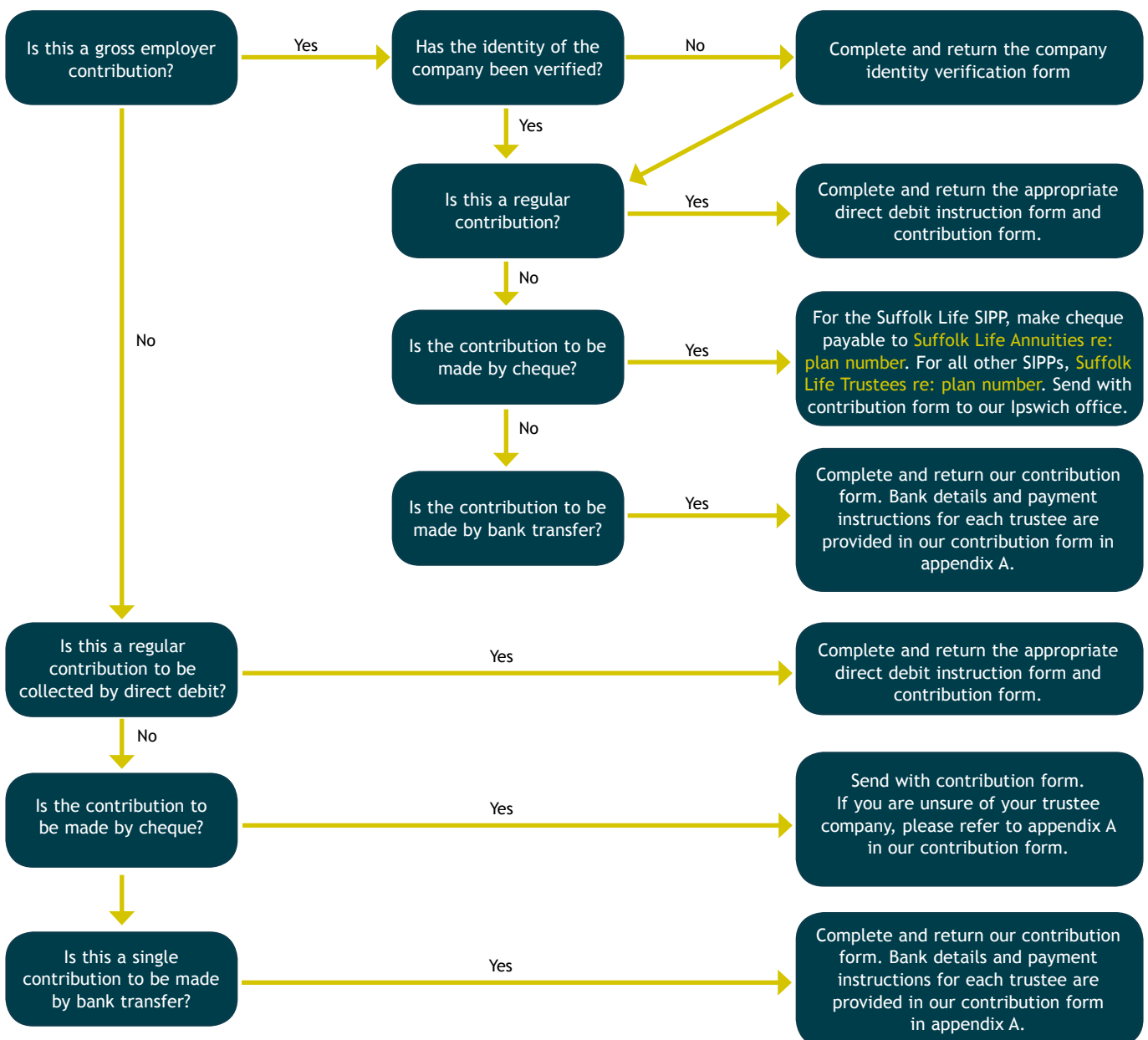
MAKING CONTRIBUTIONS

APPROVED FOR CLIENT USE | MARCH 2024



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.



Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited. Suffolk Life Pensions Limited is a company registered in England & Wales (registered number 1180742) and is authorised and regulated by the Financial Conduct Authority (number 116298). Suffolk Life Annuities Limited is a company registered in England & Wales (registered number 1011674) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (number 110468). The registered address of both companies is 153 Princes Street, Ipswich, Suffolk IP1 1QJ. Tel: 0370 414 7000 Fax: 0370 414 8000. Call charges will vary. We may record and monitor 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. SL033.202403 March 2024

CONTINUED

Contribution details

Please provide the below information for your contribution. This applies to contributions received by cheque and bank transfer. We will require our contribution form to be completed 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, whether anti-money laundering information has been received. If not, please complete a Identity Verification form for Company or other Group 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 completed on our contribution form. The form then needs to be sent to us via our secure messaging system available within our portal, that you can find at curtisbanks.co.uk. Alternatively, you can send it to us via post to Curtis Banks, 153 Princes Street, Ipswich, Suffolk. IP1 1QJ

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 01473 296 969

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E sippsupportteam@curtisbanks.co.uk

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