

## Direct Debit Instruction

### For Your Future SIPP/MasterSIPP/SimSIPP/SmartSIPP

For completion by the client or the employer when making regular contributions to the SIPP. All alterations to the Direct Debit mandate form will require confirming with a full signature.

Client name

Plan number / Application ID

If both you and your employer intend to make regular contributions, please use an additional Direct Debit.

#### Type of contribution

☐

##### Regular personal contribution

Please also complete and return a Contribution form which is available from our website

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##### Regular employer contribution

Please also complete and return a Contribution form and an Identity Verification form both of which are available from our website.

Please note: An Identity Verification form is only required if this has not previously been provided.



## Instruction to your Bank or Building Society to pay by Direct Debit

Please fill in the whole form using a ball point pen and return to us, either by secure message or by post to the following address: Curtis Banks, 153 Princes Street, Ipswich, Suffolk IP1 1QJ.

Please note: we are unable to accept the completed form via email.

#### Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

#### Name(s) of Bank Account Holder(s)

  

#### Bank/building society account number

#### Branch Sort Code

#### Reference

#### Service Use number

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#### Instruction to your bank or building society

Please pay Suffolk Life Trustees Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this instruction may remain with Suffolk Life Trustees Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s):

Date

This Guarantee should be detached and retained by the Payer



## The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Suffolk Life Trustees Limited will notify you five business days in advance of your account being debited or as otherwise agreed. If you request Suffolk Life Trustees Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Suffolk Life Trustees Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Suffolk Life Trustees Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0370 414 7000, or via the Typetalk service on 18001 0370 414 7000.

Suffolk Life,  
153 Princes Street,  
Ipswich, IP1 1QJ

T 0370 414 7000  
F 0370 414 8000  
[curtisbanks.co.uk](http://curtisbanks.co.uk)

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

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