

ShareDeal Active SIPP Trading Account application form

I. ShareDeal Active SIPP Trading Account Application Form

TO BE COMPLETED BY ALL APPLICANTS

Title Mr Mrs Miss Ms Other

Surname

Forename(s)

Date of Birth

Have you moved in the last 18 months?
If yes, please complete the following Yes No

Current Address

Previous Address

Postcode

Postcode

Daytime Phone

Evening Phone

Mobile Phone

Email Address

Your National Insurance No. **Yes:** I have a National Insurance Number Please enter it here
You **must** provide this or
declare that you do not **No:** I declare that I do not have a
have one National Insurance Number

Nationality

Jarvis Account No.

If applicable

Mother's Maiden Name (for security purposes)

Does your employer or other body require copy contract notes? Yes No

If yes, please complete the following:

Company Name

Address

Contact Person

Postcode

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2. Trustee's Details

Trustee's Details

Name	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Contact	<input type="text"/>
Phone	<input type="text"/>
Email Address	<input type="text"/>
IR Ref.	<input type="text"/>
SIPP Plan Ref.	<input type="text"/>
Scheme Name	<input type="text"/>

Administrator's Details (If different)

Name	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Phone	<input type="text"/>
Email Address	<input type="text"/>

The Trustee and Administrator of the assets may receive details of transactions and corporate actions. All assets will be held on behalf of the Trustee as the legal owner in JIM Nominees Ltd. and monies will only be accepted or remitted in accordance with the Trustee's and Administrator's instructions.

3. Member's Declaration

I confirm that the information is true and complete and authorise the Account Manager to make any credit reference and enquiries in connection with this application.

I can confirm that I am a UK resident for tax purposes. I acknowledge that Jarvis Investment Management Ltd offers an execution-only Investment service.

I declare that the Trustee and Administrator, detailed in section 2 of this form, will act respectively as the trustee and administrator of my SIPP and declare that I have undertaken to invest within Inland Revenue regulations. I confirm that I have the necessary authorisation from the Trustee and Administrator to deal directly.

I have read and acknowledge the risk warning issued by the Account Manager. I agree to be bound by the enclosed Terms and Conditions.

Date / /

Signed

Money Laundering

You may undertake a search with Experian for the purposes of verifying my identity. To do so Experian may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained.

On completion please detach and return to: The Account Manager, ShareDeal Active, 78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS.
Additional forms are available on request.