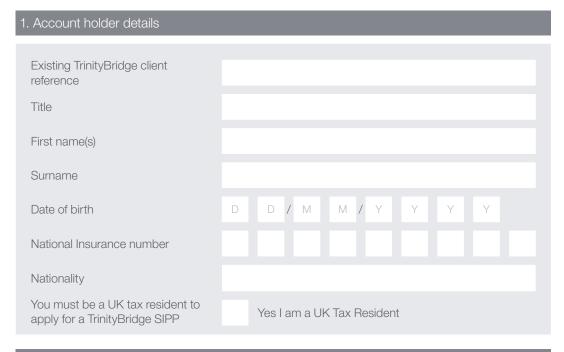
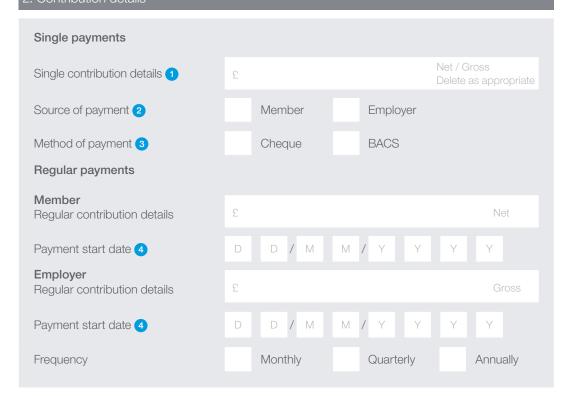


TrinityBridge SIPP Contribution Form



2 Contribution details



Please note any applications that are not completed correctly may incur delays or may have to be returned to you.

- All Member contributions should be made net of basic rate tax. We will reclaim the basic rate tax from HM
 Revenue & Customs and add this to your TrinityBridge SIPP.
 All Employer contributions should be paid gross.
- 2 Please indicate whether this is a personal contribution or it is being paid by your employer.
- 3 Cheques should be made payable to TrinityBridge Limited. Your name should also be written on the cheque. For Employer contributions, the cheque must be drawn on a UK bank or building society account in your employer's

Please note payments made by BACS transfer must include client surname and initial in the reference field.

4 This can be any date between 1st and 28th of a month.

Please complete the Direct Debit mandate at the back of this form. If your Employer is making the contributions on your behalf, they will need to complete and sign the Direct Debit mandate.

Please allow 15 working days from our receipt of your application for the first payment to be collected.

3. Employer details (5	
Company name	
Company address	
	Postcode
Company registration number	

Company name		
Company address		
	Postcode	
Company registration number		
4. Employment status 6		
Employed		In full-time education
Self-employed		Caring for one or more children under the age of 16
Unemployed		Caring for a person aged 16 or over
Pensioner		Other (please specify below)

TrinityBridge range of funds

How would you like to invest the money in your account?

TrinityBridge Fund (X Class)	Inc units	Acc units	£ Investment	OR	% Investment
Sustainable Bond Portfolio			£	OR	%
Select Fixed Income Fund			£	OR	%
Diversified Income Fund			£	OR	%
Conservative Portfolio Fund			£	OR	%
Balanced Portfolio Fund			E	OR	%
Sustainable Balanced Portfolio Fund			£	OR	%
Growth Portfolio Fund			£	OR	%
Managed Income Fund			£	OR	%
Conservative Managed Fund			£	OR	%
Balanced Managed Fund			£	OR	%
Growth Managed Fund			£	OR	%
Conservative Tactical Passive Fund			£	OR	%
Balanced Tactical Passive Fund			E	OR	%
Growth Tactical Passive Fund			£	OR	%

- 5 This section should be completed if your employer is making contributions to your TrinityBridge SIPP.
- 6 Select the option (one only) that best describes your status.

6. Managed Portfolio Service (MPS)

	£ Investment	OR	% Investment
Income Plus	£	OR	%
Conservative	£	OR	%
Balanced	£	OR	%
Growth	£	OR	%

7. Discretionary Managed Service (DMS)

	£ Investment	OR	% Investment	Fee for investment management
Defensive Income	£	OR	%	%
Income Plus	£	OR	%	%
Conservative	£	OR	%	%
Balanced	£	OR	%	%
Growth	£	OR	%	%

Tick here for the Socially Responsible Investment Portfolio

Stock Restrictions - DMS

Are there any equities that we should not purchase?

Name(s) of equity(ies)

8. Glide Path strategy

Glide Path ter	m Glide	e Path risk level	£ Investment
20 years	S	Glide Path I	£
25 years	S	Glide Path II	
30 years	S		

9. External Manager Funds

External fund name	Sedol code	Inc/Acc	£ Investment	OR	% Investment
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%
			£	OR	%

10. Declaration and signature

- I declare that, to the best of my knowledge, the details provided in this form are correct, complete and not misleading and that the information provided when the SIPP was established is still valid.
- I understand it is a serious offence to make false statements: the penalties are severe and could lead to prosecution.

Signature – Adviser or account holder			
Adviser name or account holder name (BLOCK CAPITALS)			
Date of signature	D	D / M M / Y Y Y	

11. Employer declaration 🕇

- We understand that as the employer we have no rights to any benefits which are payable under the terms of this plan and the rules of the scheme (which may be amended from time to time).
- We agree to pay the contributions detailed on this form until further notice and will notify TrinityBridge of any changes to the payments.
- We will advise you immediately if the member leaves our employment.
- We understand that to enable us to make employer contributions to the members SIPP, TrinityBridge will need to verify the identity of the company.

Signature – For and on behalf of the employer	
Print name (BLOCK CAPITALS)	
Job title	
Date of signature	D D / M M / Y Y Y

To be completed when your employer is making a contribution to your TrinityBridge SIPP.





Please fill in the whole form including official use box using a ball point pen and send to the address below or alternatively please esign and return via the encrypted email:

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

		num	

2 7 5 0 7

For TrinityBridge Ltd official use only. This is not part of the instruction to your bank or building society.

Instruction to your Bank or Building Society

Please pay TrinityBridge Ltd 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 TrinityBridge Ltd and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)	
Date	

Banks and Building Societies may not accept Direct Debit Instructions for some types of account

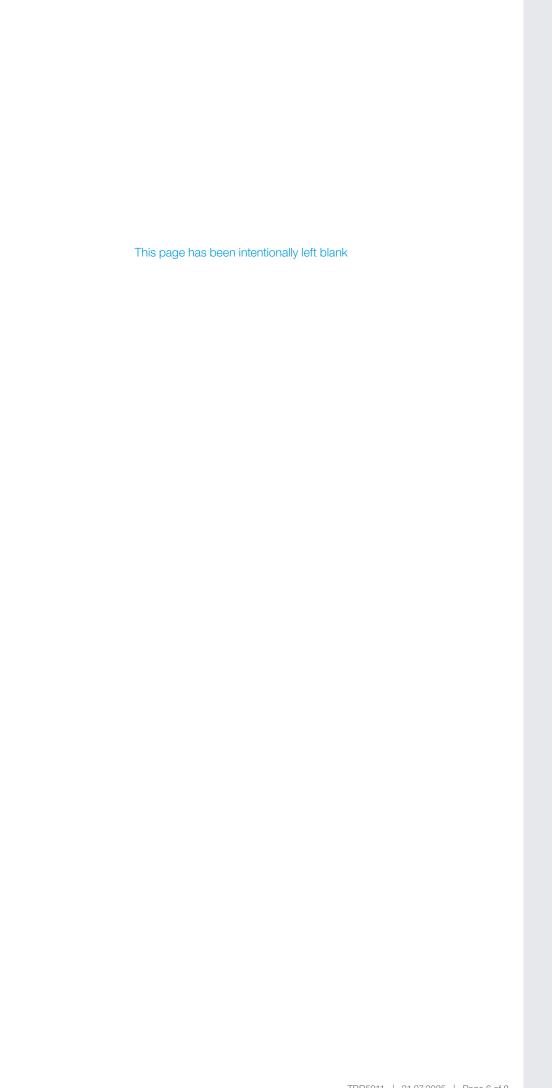
DDI 1 5/15

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 TrinityBridge Ltd will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request TrinityBridge Ltd 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 TrinityBridge Ltd 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 TrinityBridge Ltd 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.







Please fill in the whole form including official use box using a ball point pen and send to the address below or alternatively please esign and return via the encrypted email:

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Brar	nch	So	rt C	ode										
Name and full postal address of your Bank or Building Society														
To: The Manager Bank/building society														
Address														
									Pos	tcoc	de			
Refe	erer	nce												

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

		num	

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Signature(s)	
Date	

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DDI 1 5/15

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