Regular Cash and Investment Contributions
Direct Investment Service

TrinityBridge

About you

Title	
First name	
Middle name(s)	
Surname	
Date of birth	D D / M M / Y Y Y Y
Your username 1	

A. Set up a new regular cash contribution 2 3

Which account would you like your payment to go to?

☐ Investment Account ☐ Stocks & Shares ISA ☐ TrinityBridge SIPP

Account name and number as shown online or on any correspondence from us

Payment amount 4 £

Payment frequency ☐ Monthly ☐ Quarterly ☐ Yearly

Payment start date 5 D D / M M / Y Y Y Y

What would you like us to do with this regular contribution?

☐ Leave as a cash contribution in my capital account ☐ Invest my regular contribution into my chosen investments*

*Please complete the section below to detail where to invest your regular contribution.

We can only accept regular contributions into your accounts from your registered bank account. You can change your registered bank account at any time by completing an amendment form.

Please note that it will take three business days once your application has been received and processed to initiate a new Direct Debit instruction, and so you will only be able to set up a new Direct Debit instruction to start 15 business days or more from when your application is submitted.

1 Your online username can be found in the top right hand corner of your online portal screen i.e. ASmith123.

2 Please note this may have adverse tax consequences if your SIPP is in drawdown and/or there is a 'crystallised' element.

When you make new payments into your SIPP, we will generate a personalised SIPP illustration and place this in your Document library.

Where you are making a contribution to TrinityBridge SIPP, the payment should be the net amount. Tax relief will be applied and added to your SIPP account each month.

3 **Please complete a seperate form for each new contribution you wish to set up. Please also complete the attached Direct Debit mandate in Section C of this form.**

4 **Minimum contributions**

Payment frequency	Minimum contribution
Monthly	£50 contribution
Quarterly	£150 contribution
Annually	£600 contribution

5 Please note this must be a minimum of 15 business days from the date you submit your application and must fall on or between the 1st and 28th of the month. If we are unable to take the first payment on the date specified, we will take it as soon as possible and revert to the requested date for subsequent months.

Regular investment instructions

Where would you like this to be invested

Investment name	Sedol	Amount
		£
		£
		£
		£
		£
		£
		£
		£
		£
	Total 6	£

6 The total must add up to your total regular investment amount. Any unallocated cash will be kept as cash in your capital account.

7 If you wish to cancel a Direct Debit you can do so at any time by contacting your bank or building society. Written confirmation may be required. Please also notify us.

B. Amend an existing regular contribution 3 7

Account name and number as shown online or on any correspondence from us

Existing payment amount £

Existing payment frequency ☐ Monthly ☐ Quarterly ☐ Yearly

What type of contribution is this currently? ☐ Regular cash contribution ☐ Regular investment contribution

Confirm new Direct Debit and destination details

Which of your accounts would you like this new regular contribution to go to?

Details of this account

Account name and number as shown online or on any correspondence from us

Payment amount £

Payment frequency ☐ Monthly ☐ Quarterly ☐ Yearly

Payment start date 5 D D / M M / Y Y Y Y

What would you like us to do with this regular contribution?

☐ Leave as a cash contribution in my capital account

☐ Invest my regular contribution into my chosen investments*

*Please complete the section below to detail where to invest your regular contribution.

Regular investment details for your new instruction

Where would you like this to be invested

Investment name	Sedol	Amount
		£
		£
		£
		£
		£
		£
		£
		£
		£
	Total 6	£

Signature

Print name (BLOCK CAPITALS)

Date D D / M M / Y Y Y Y

To return this form, please scan and email it from your registered email address to:
directinvestment@trinitybridge.com

Or you can post it using our FREEPOST address:
'freepost TRINITYBRIDGE INVESTOR SUPPORT'

Or, if signing electronically via DocuSign then click 'Finish' to submit

Our Terms and Conditions are available online, please visit:
trinitybridge.com/general-terms-and-conditions

Call us with any questions on:
0800 33 99 99 8am - 6pm, Mon - Fri excl. UK bank holidays

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TrinityBridge

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

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:

TrinityBridge Ltd
Wigmore Yard
42 Wigmore Street
London
W1U 2RY
UK

Service user number

2	7	5	0	7	1

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

Name(s) of Account Holder(s)

Bank/Building Society account number

Branch Sort Code

Name and full postal address of your Bank or Building Society

To: The Manager   Bank/building society

Address

Postcode

Reference

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.