

1. Personal details

Title	<input type="text"/>
First name	<input type="text"/>
Middle name(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="/"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="/"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

2. Change of pension beneficiaries ¹

New details (complete as necessary)

Beneficiary 1

Title	<input type="text"/>
First name(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="/"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="/"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Relationship to you	<input type="text"/>
Permanent residential address	<input type="text"/>
Postcode	<input type="text"/>
Proportion of benefit ²	<input type="text"/> %

New details (complete as necessary)

Beneficiary 2

Title	<input type="text"/>
First name(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="/"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="/"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Relationship to you	<input type="text"/>
Permanent residential address (including post code)	<input type="text"/>
Proportion of benefit ²	<input type="text"/> %

Please complete this form if you wish to:

- Nominate beneficiaries of death benefits arising under your TrinityBridge SIPP, or
- Change your income instructions.
- Change the name of your Investment Account to something of your choice.

¹ You can nominate beneficiaries of death benefits arising under your TrinityBridge SIPP in the event of your death which you want the Trustees to consider before making any payment. Please note that the Trustees will have the discretion in deciding who to pay the death benefits.

² All of these should add up to 100%.

3. Change of Investment Account name

Investment Account name and account number

What would you like to rename this account to?

4. Change of income instructions ³

New income details

Which of your accounts does this instruction relate to?

Stocks and Shares ISA

Investment Account

Account name and number

What would you like us to do with your income? ⁴

Keep in my capital account

Pay away to my nominated bank account

5. Signature

Signature

Print name (BLOCK CAPITALS)

Date

³ Please complete a separate form for each account you wish to change.

Please contact us to make changes to any income instructions on your TrinityBridge SIPP.

⁴ Some investments generate income in the form of dividends, distributions or interest. You need to specify how you would like this income to be treated.

To return this form, please scan and email it from your registered email address to:

directinvstment@trinitybridge.com

Or you can post it using our FREEPOST address:

'freepost TRINITYBRIDGE INVESTOR SUPPORT'

Our Terms and Conditions are available online, please visit:

trinitybridge.com/general-terms-and-conditions