



application for an IFA SIPP Share Dealing Account

This account is operated in accordance with our Terms of Business. Before applying, please ensure you have read The Share Centre's Terms of Business, Tariff and the Curtis Banks' Key Features Document. If there's something you don't understand, please give us a call on 01296 41 41 41.

Section 1: SIPP Member

Title Surname Customer ref.

Forename(s)

Date of birth Place of birth: Town Country

Nationality (all)

Do you have a National Insurance number? No Yes Please enter it here

National Client Identifier* *If you have dual nationality.

Phone Mobile

Email

Permanent residential address Post code

Time at address years months

Previous address (if less than 3 years at current address) Post code

Tax Residence UK and/or Please specify country and tax identification number (TIN)

Are you a US citizen Yes No

Memorable word If you don't already have one, please choose a word with 8 characters or more (not your name). This will enable you to view your SIPP online at share.com.

Section 2: Managing your account

Income: (tick one) left in the account as cash (default) re-invested into the same company that paid the dividend

Section 3: Declaration and authorisation by SIPP Member

I declare that:

- The above information is true and correct
- I will notify The Share Centre without delay of any circumstances or changes affecting the information on this form
- I accept that you may in your absolute discretion decline this application without reason being given
- I acknowledge that The Share Centre provides an execution-only investment service
- I understand that The Share Centre provides the SIPP Dealing Account to the SIPP Trustee as its client
- I agree to be bound by The Share Centre's Terms of Business and Tariff
- The SIPP Trustee and SIPP Administrator detailed in Section 4 of this form will act respectively as the SIPP Trustee and SIPP Administrator of my SIPP, and that I have undertaken to invest within HMRC regulations
- I authorise all contract notes and valuation statements regarding this SIPP Account to be sent to the IFA detailed in Section 5 of this form.

I authorise the Third Party Manager / Independent Financial Advisor detailed overleaf to:

- Buy and / or sell shares after consultation with me, obtain balances, and request information on this account
- My signature confirms all the statements and instructions on this form.

Signature

Date

Section 4: SIPP Trustee details (to be completed by the SIPP Provider)

SIPP Trustee

SIPP designation	<input type="text"/>	SIPP Administrator	<input type="text" value="Curtis Banks"/>
Contact person(s)	<input type="text" value="Investments Team"/>	Phone	<input type="text" value="0117 910 7910"/>
Email	<input type="text" value="InvestmentTeamMailbox@curtisbanks.co.uk"/>		
Address	<input type="text" value="Curtis Banks Limited"/>		
	<input type="text" value="3 Temple Quay"/>		
	<input type="text" value="Bristol"/>	Post code	<input type="text" value="B"/> <input type="text" value="S"/> <input type="text" value="1"/> <input type="text" value="6"/> <input type="text" value="D"/> <input type="text" value="Z"/>
PSTR	<input type="text"/>	SIPP plan reference	<input type="text"/>
Scheme name (if applicable)	<input type="text"/>		

All assets within the SIPP Dealing Account will be held on behalf of the SIPP Trustee (as the legal owner) in the name of our nominee as provided in our Terms of Business. Monies will only be accepted and remitted in accordance with the SIPP Trustee and/or SIPP Administrators instructions.

Section 5: Independent Financial Advisor (IFA) details

Advisor name	<input type="text"/>	Firm address	<input type="text"/>
Firm name	<input type="text"/>		<input type="text"/>
FCA number	<input type="text"/>		<input type="text"/>
Contact number	<input type="text"/>		<input type="text"/>
Email	<input type="text"/>		
LEI*	<input type="text"/>		

*If you will only place deals in funds (unit trusts/OEICs) you do not have to provide an LEI, but we recommend you provide this information to ensure our full range of dealing services remain open to you.

Memorable word If you don't already have one, please choose a word with 8 characters or more (not your name).

Please note that all IFA remuneration will be performed by Curtis Banks and not by the Share Centre.

Section 6: SIPP trustee(s) declaration

We confirm that we are the SIPP Trustee(s) acting on behalf of the SIPP Member detailed in Section 1. We confirm that we have received and agree to be bound by the Terms of Business.

Please open a SIPP Dealing Account for the SIPP Trustee (which the SIPP Trustee will hold as trustee in respect of the SIPP Member). We understand that The Share Centre will treat the SIPP Member and no other person as its "client" for the purposes of the rules of the Financial Conduct Authority (FCA). We accept that you may in your absolute discretion decline this application without giving reasons and we acknowledge that The Share Centre offers an execution-only investment service.

SIPP Trustee 1

Signature (s)	<input type="text"/>
Name(s) and position	<input type="text"/>
On behalf of	<input type="text"/>
Date	<input type="text"/>

SIPP Trustee 2

Signature (s)	<input type="text"/>
Name(s) and position	<input type="text"/>
On behalf of	<input type="text"/>
Date	<input type="text"/>

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