

Change of Address Form for SIPP Updating Your Address Details

Please use this form if you have moved or are about to move house, and return it to Curtis Banks at the above address.

1 Accessing our services

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Curtis Banks Group, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Information Notice for Clients, should you require further guidance on how we collect use and protect your personal information. This can be found on our website www.curtisbanks.co.uk or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent, please contact the Client Management Team on 0117 332 4080 or cmt@curtisbanks.co.uk.

2 Your current/old details

Plan number

Full name

Address

3 Your new details

Address

Home telephone

Mobile telephone

Work telephone

Email

4 Declaration

Please note my change of address to commence (please tick or complete date as appropriate):

With immediate effect

From a specific date

Date

Eligibility

Please indicate below which of the following apply to you:

1

I am a UK relevant individual

A UK relevant individual is one who:

- has relevant UK earnings chargeable to income tax for that year;
- is resident in the UK at some time during that tax year;
- was resident in the UK at some time during the five years immediately before the tax year in question and was also resident in the UK when the individual joined the pension scheme;
- has general earnings for that tax year from overseas Crown employment subject to UK tax (as defined by Section 28 of the Income Tax (Earnings and Pensions) Act 2003).

2

I am a non relevant individual who was a UK resident or had earnings chargeable to UK tax in the last five years

You are entitled to receive tax relief on contributions.

3

I am a non UK individual

You are entitled to contribute any amount, but you will not be entitled to receive any tax relief on your contributions.

Member Declaration

I will inform the scheme administrator in writing (within 30 days) if:

- I cease to be a UK resident or change my country of residency;
- I contribute on aggregate more than 100% of my earnings to this and any other pensions scheme in any tax year;
- I cease to have UK relevant earnings;
- I begin to have UK relevant earnings again;
- There is a change in my employment status;
- There is a change in my permanent residential address.

Member's signature

Date

Curtis Banks Limited,
3 Temple Quay,
Bristol, BS1 6DZ

T 0117 910 7910
F 0117 929 2514
curtisbanks.co.uk

Call charges will vary. We may record and monitor calls.

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication.

Curtis Banks Limited is a company registered in England & Wales (registered number 06758825) and is authorised and regulated by the Financial Conduct Authority (number 492502) with its registered address at 3 Temple Quay, Bristol BS1 6DZ. CHANGEADD 0623 June 2023

