

Direct Debit Instruction

Montpelier Pension Trustees Limited

For completion by the client or the employer when making regular contributions to the SIPP. All alterations to the Direct Debit mandate form will require confirming with a full signature.

Client name Plan number / Application ID

If both you and your employer intend to make regular contributions, please use an additional Direct Debit.

Type of contribution

☐

Regular personal contribution

Please also complete and return a Contribution form available from our website.

☐

Regular employer contribution

Please also complete and return a Contribution form and an Identity Verification form both available from our website.

Please confirm payment date:

1st of month ☐

8th of month ☐

15th of month ☐

Last day of month ☐

Start date



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

Please fill in the whole form using a ball point pen and send to:
Curtis Banks, 3 Temple Quay, Bristol, BS1 6DZ

Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Name(s) of Account Holder(s)

Bank/building society account number

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Branch Sort Code

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Reference

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Service Use number

4	4	4	3	2	8
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Instruction to your bank or building society

Please pay Montpelier Pension Trustees Limited 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 Montpelier Pension Trustees Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s):
Date

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 Montpelier Pension Trustees Limited will notify you 10 business days in advance of your account being debited or as otherwise agreed. If you request Montpelier Pension Trustees Limited 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 Montpelier Pension Trustees Limited 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 Montpelier Pension Trustees Limited 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.

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. SL251.202308 August 2023

