



WHITEHALL

whitehallgroup.co.uk

# SIPP Contribution Form: Employer Contributions

## 1. Notes

- This form is your employer's confirmation when contributions:**

  - **Start or they change regular contributions.**
  - **They pay a single contribution.**

**This form supersedes all previous instructions.**
- If you have any questions about the completion of this form, please contact us at [sipp@whitehallgroup.co.uk](mailto:sipp@whitehallgroup.co.uk) or telephone 03302 232300.
- Before deciding to make contributions, we recommend you take financial advice from an FCA-regulated financial adviser. They will charge for their services.
- Please return the completed form to us at our address below. Email copies are accepted.
- There is a maximum annual amount that can be contributed to your pension arrangements (called the Annual Allowance).
- Employer contributions are an allowable business expense to reduce corporation tax.
- Your maximum contributions depend on your personal circumstances. We accept your contributions in good faith.
- Please refer to our Contribution Guidelines for full details. This is available on our website at [www.whitehallgroup.co.uk](http://www.whitehallgroup.co.uk) or on request.
- Contributions received will remain in the SIPP bank account until we receive an investment instruction. Please contact us should you wish to make an instruction. We ask you to maintain a minimum cash balance of £1,000 to cover outgoings such as fees, adviser charges and income/pension payments.
- Contributions can be made by single payments, standing order or cheque. Payments should be payable to:

Account Name:	WHITEHALL GROUP SIPP LIMITED MAIN ACCOUNT GENERAL ACCOUNT
Sort Code:	160079
Account Number:	16446726
Reference:	Your name and SIPP number
Cheques made payable to:	WHITEHALL GROUP SIPP LIMITED MAIN ACCOUNT GENERAL ACCOUNT – Your name and SIPP number

## 2. Member's Details

Title (Mr/Mrs/Miss/Ms/Dr)	<input type="text"/>
Forename(s)	<input type="text"/>
Surname	<input type="text"/>
SIPP Number	<input type="text"/>
Date of Birth	<input type="text"/>
National Insurance Number	<input type="text"/>
Have you received financial advice in relation to this contribution change?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, name of Adviser	<input type="text"/>
Name of Adviser's firm	<input type="text"/>

## 3. Employer Details

Employer name	<input type="text"/>
Registered Address	<input type="text"/>
	<input type="text"/>
Post code	<input type="text"/>
Company Registered Number	<input type="text"/>
Contact name	<input type="text"/>
Contact email address	<input type="text"/>
Contact telephone number	<input type="text"/>
Listed on a recognised stock exchange	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<input type="text"/>

## 4. Employer Contribution Details

Single contribution	<input type="text"/>	<b>Note:</b> All employer contributions are made gross.
Regular contribution	<input type="text"/>	
If regular, payment frequency	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual <input type="checkbox"/>	
Start Date	<input type="text"/>	
End Date	<input type="text"/>	

Are contributions being deducted from salary and paid to the SIPP on the member's behalf?  
Yes  No

Are contributions being paid to the SIPP as a result of the member opting out of an employer's workplace pension scheme?  
Yes  No

If yes, you (the employer) have a duty to pay employee contributions to us by the "Payment Due Date". This is the 19<sup>th</sup> of the month following the date of the deduction from pay. For example, a contribution deducted from pay on 5<sup>th</sup> May must be received by us no later than 19<sup>th</sup> June. We have a duty to report the late payment of any contribution that is of material significance to the Pensions Regulator.

## 5. Money Purchase Annual Allowance

Have you started receiving a pension income from any of your pension arrangements?

Yes

No

Have you started receiving a pension income from a flexible annuity arrangement?

Yes

No

If yes to either, the date your pension income commenced

**Note:** don't include Defined Benefit (final salary schemes)  
**Note:** if yes, your total annual contributions are limited to £10,000 per tax year. This is the Money Purchase Annual Allowance.

## 6. Identity Verification

If the employer is not listed on a recognised stock exchange, before we can accept payments we need to electronically verify the identity of two individuals with a controlling interest of 25% or more in the employer.

Please provide details of two individuals so that we are able to conduct the relevant checks.

	Individual 1	Individual 2
Title (Mr Mrs Miss Ms Dr etc)	<input type="text"/>	<input type="text"/>
First Name(s)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Home Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Post code	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
National Insurance Number	<input type="text"/>	<input type="text"/>

Please also provide copies of the individual's passports and evidence of address such as a personal bank statement or utility bill which is not more than three months old.

## 7. Member Declarations

- I declare that to the best of my knowledge and belief all statements made in this form (including the contents of this declaration) as at the date of completion (whether in my handwriting or not) are correct and complete.
- I (or the Member if this declaration is being made by a parent or legal guardian) am a Relevant UK Individual under Section 189 of the Finance Act 2004.
- I agree and consent to Whitehall Group SIPP Limited carrying out checks to confirm my identity, residence and source of wealth and I agree to supply all requested information deemed necessary for the purpose of these checks.
- I authorise Whitehall Group SIPP Limited to pay my adviser (detailed in appendix A) the agreed adviser charges. I understand that any adviser charges will be paid from my SIPP bank account or paid by my nominated investment manager to my adviser.
- I confirm that I will not use my Whitehall SIPP for "Tax-Free Lump Sum Recycling" (paying pension contributions out of tax-free lump sums received from this or any other registered pension scheme).
- If I am already subject to the Money Purchase Annual Allowance (MPAA), I have supplied the date the MPAA first applied to me in Section 4 of this application.

7. I accept that Whitehall Group SIPP Limited is not responsible for checking whether I am subject to the MPAA before accepting contributions and will accept contributions in good faith. I understand that I will incur a tax charge if I exceed my available Annual Allowance and I cannot use carry forward allowance to mitigate this.

## 8. Employer Declarations

1. We agree to pay the above contributions until further notice, or until the end date where applicable, and will notify Whitehall Group SIPP Limited of any change and provide a new employer contributions form.
2. Where the employer has a duty to pay employee contributions to the member's Whitehall SIPP by the "Payment Due Date" we acknowledge this is the 19th of the month following the date of the deduction from pay. For example, a contribution deducted from pay on the 8th June must be received by us no later than the 19th July. We understand that Whitehall Group SIPP Limited has a duty to report the late payment of any contribution that is of material significance to The Pensions Regulator.
3. We acknowledge that employers are obliged by The Pensions Regulator to provide a new employer contributions form, for any amendments to contributions.
4. I am an authorised signatory for the employer noted on this form and I agree with the above statements and confirm the employer and contribution details on this form are correct.

## 9. Member Signature

If contributions are being paid on behalf of a member under the age of 18 this form should be signed by a parent or legal guardian.

Your Name

Your Signature

Date

## 10. Employer Signature

Your Name	
Position	
Your Signature	
Date	

## 11. Appendix A: Adviser Remuneration and Declaration

Please complete this section and confirm details of any adviser charges agreed in relation to this contribution.

Adviser's name	
Firm name	
FCA reference number	
Email address	
Telephone Number	

Are you to be remunerated from this/these contribution(s)? Yes  No

If yes, Initial payment	Percentage	<input type="text"/>	%	Specific sum	£ <input type="text"/>
Ongoing payment	Percentage	<input type="text"/>	%	Specific sum	£ <input type="text"/>

Name	
Signature	
Position	
Senior Management Functions held	
Date	

Please Return this form to:

**Whitehall Group**

**8-10 Bolton Street**

**Ramsbottom**

**BLO 9HX**

Contact Us:

Telephone: 03302 232300

Email: [ssas@whitehallgroup.co.uk](mailto:ssas@whitehallgroup.co.uk)

Email: [sipp@whitehallgroup.co.uk](mailto:sipp@whitehallgroup.co.uk)

Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294), Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590), Whitehall Group SIPP Limited, a company registered in England and Wales (Registered number 13577749) and Whitehall SIPP Trustees Limited, a company registered in England and Wales (Registered number 13587700). All companies have their registered office at 8-10 Bolton Street, Ramsbottom, BLO 9HX.

Whitehall Group SIPP Limited is authorised and regulated by the Financial Conduct Authority (FCA) firm reference number 978183.