

## ADDITIONAL CONTRIBUTIONS FORM

# THE AEGEAN

## PERSONAL PENSION PLAN

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### **Sovereign Pensions Limited**

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## Additional Contributions - Personal or Employer Contributions

If a member wishes to make additional contributions after the initial transfer of assets into their retirement plan, the Aegean Personal Pension Plan ("the Plan"), the trustee will always require relevant source of wealth details (together with the pertinent supporting documentation) on how the funds were accumulated (e.g. inheritance, sale of property, divorce, employment bonus or remuneration).

Type of contribution:  Personal  Employer

Single contribution: Currency: \_\_\_\_\_ Amount: \_\_\_\_\_

Regular contribution: Currency: \_\_\_\_\_ Amount: \_\_\_\_\_

Frequency (monthly, quarterly or annually): \_\_\_\_\_

Please advise how the above contribution has been accumulated: \_\_\_\_\_

Please advise what supporting material you have provided for the above contribution: \_\_\_\_\_

Any contributions that are received will be held in the trustee's account (non-interest bearing) and accumulated until such time an amount is reached that can be invested and transferred to your existing investment.

The trustee will not accept contributions until due diligence procedures have been completed and the trustee is in receipt of certified supporting documentation.

### Declaration

1. I hereby wish to make the aforementioned contributions into my plan and agree that they shall be held and administered in accordance with the rules and the terms and conditions of the plan.
2. I agree to any time charges which may be raised by the trustee in order to accept the contributions. Time charges for any work undertaken not covered by our fee schedule are charged at £100 per hour.
3. I have fully disclosed the source of wealth relating to the contributions being made.
4. I have not relied upon the trustee of the plan, the Sovereign Group or any of its subsidiaries and officers of such subsidiaries for any legal or tax advice relating to my decision to make additional contributions into my pension.

Member's signature: \_\_\_\_\_

Member's name: \_\_\_\_\_

Member's address<sup>1</sup>: \_\_\_\_\_

Member's contact number: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

<sup>1</sup> Please note that should this be different to the residential address initially confirmed to us, proof of address no older than three months will be required for us to update our records.