

Additional Contributions

If a member wishes to make additional contributions after the initial transfer of assets into their pension ("the Scheme"), 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 – tick box here: Employer – tick box here:

Single Contribution: Currency: Amount:

Regular Contributions: Currency: Amount:

Frequency:

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 pension and agree that they shall be held and administered in accordance with the rules and the terms and conditions of the Scheme.
2. I agree to the charges raised by the Trustee in order to accept the contributions.
3. I have fully disclosed the source of wealth relating to the contributions being made.

Signed: _____ Member's Signature

Name: _____ Member's Name

Date : ____ / ____ / ____