



## Contribution Amendment Form

### Application guide

Please use this form if you have a regular contribution instruction in place and wish to:

- increase/ decrease
- suspend/ reinstate
- cancel

your regular contributions.

If you would like to set up a regular contribution or pay in a single contribution, please complete a SIPP Supplementary Contribution Form which is available on our website at [www.jameshay.co.uk](http://www.jameshay.co.uk).

Please note: If you are reinstating contributions, the reinstatement date must be within 12 months of the date you suspended contributions. If you wish to reinstate a contribution after 12 months has elapsed, please complete a new SIPP Supplementary Contribution Form.

If you require assistance, please call your Service Executive Team or our general enquiry number 03455 212 414.

**Please note: You must cease making contributions to our SIPPs by age 75.**

1 Personal details		Applicant to complete	
Title	<input type="text"/>		
Forename(s)	<input type="text"/>		
Surname	<input type="text"/>		
Member number	<input type="text"/>		
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		Postcode <input type="text"/>
Telephone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		
National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
			<b>OR</b> I have never had a National Insurance number <input type="checkbox"/>

2 Entitlement to tax relief		Applicant to complete	
<b>Please only complete the following section if you are reinstating contributions and your tax entitlement has changed since you last completed a tax entitlement declaration.</b>			
(i) I have relevant UK earnings chargeable to income tax, or general earnings from overseas Crown employment subject to UK tax, in this tax year.	<input type="checkbox"/>	Yes	<input type="checkbox"/> No
(ii) I have, or shall have, been resident in the UK at some time during this tax year.	<input type="checkbox"/>	Yes	<input type="checkbox"/> No
(iii) My spouse or civil partner has general earnings from overseas Crown employment subject to UK tax, for this tax year.	<input type="checkbox"/>	Yes	<input type="checkbox"/> No
(iv) I or my spouse or civil partner is in overseas Crown employment, but for this tax year do not have general earnings from overseas Crown employment subject to UK tax.	<input type="checkbox"/>	Yes	<input type="checkbox"/> No

If you have ticked Yes to (i) or (ii) we will reclaim basic rate tax on your personal contributions. If you are liable to income tax at a rate above basic rate, you will be able to claim any additional relief from HM Revenue and Customs (HMRC) either through your self assessment return or, if you do not complete one, by contacting HMRC.

If you have ticked Yes to (iii) or (iv) we will reclaim basic rate tax on your personal contributions up to £3,600 gross.

If you have ticked No to all of the above or have not completed this section at all, we will not reclaim any basic rate tax relief on your personal contributions.

## 2 Entitlement to tax relief (cont.)

### Residency

If you are a Scottish resident (as determined by HMRC) your tax rate may differ.

For example, you may be liable to income tax at no more than the Scottish starter rate of 19%. For the 2020/21 tax year we will still claim tax relief of 20% where applicable. HMRC has stated that it will not recover the difference between the Scottish starter rate and the Scottish basic rate for the 2020/21 tax year.

If you are liable to income tax at a rate above the Scottish basic rate of 20%, you will be able to claim the additional relief from HMRC either through your self assessment return or, if you do not complete one, by contacting HMRC.

The Welsh government may amend the rate of income tax paid by Welsh residents, and if they do, this may impact the amount of tax we can reclaim on contributions made by Welsh residents. The Welsh government has indicated that they will not amend the rate of income tax for the 2020/21 tax year.

## 2a Personal contributions

Applicant to complete

Please complete this section if you wish to make amendments to your regular personal contributions.

### (i) Amend contribution amount

Current amount £  (net) by Direct Debit

New amount £  (net) by Direct Debit

Effective date of amendment

**Please state the net amount that you would like to pay into your SIPP. If, as per Section 2, we are able to reclaim basic rate tax on your personal contributions, this tax amount will be added to your stated net contribution amount. Please therefore note that the gross figure (the net amount you are contributing plus the value of any tax reclaim) is the figure used to calculate against your annual allowance or money purchase annual allowance.**

### (ii) Amend contribution frequency

Current frequency  Monthly  Quarterly  Half-yearly  Annually

New frequency  Monthly  Quarterly  Half-yearly  Annually

Effective date of amendment

### (iii) Amend payment collection date

Current collection date

New collection date

Effective date of amendment

### (iv) Suspend/reinstate/cancel regular contributions

I wish to suspend existing contributions:

with immediate effect  or with effect from

I wish to reinstate existing contributions:

with immediate effect  or with effect from         <sup>1</sup>

I wish to cancel existing contributions:

with immediate effect  or with effect from

<sup>1</sup> Please note that the reinstatement date must be within 12 months of the suspension effective date. If you wish to reinstate a contribution after 12 months has elapsed, please complete a new SIPP Supplementary Contribution Form which is available on our website.

Please complete this section if you wish to make amendments to regular employer contributions.

Contact name	<input type="text"/>
Contact number	<input type="text"/>
Registered address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	Postcode
Telephone	<input type="text"/>
Email	<input type="text"/>

**(i) Amend contribution amount from your employer's funds**

Current amount      £  (gross)      by Direct Debit

New amount      £  (gross)      by Direct Debit

Effective date of amendment     

**Please note that employer contributions to your SIPP (including salary sacrifice arrangements) are paid gross.**

**(ii) Amend contribution amount from your taxed income, sourced from your employer**

Current amount      £  (net)      by Direct Debit

New amount      £  (net)      by Direct Debit

Effective date of amendment     

**Employee contributions paid from your taxed income should be paid net of tax. If, as per Section 2, we are able to reclaim basic rate tax on your personal contributions, this tax amount will be added to your stated net contribution amount. Please therefore note that the gross figure (the net amount you are contributing plus the value of any tax reclaim) is the figure used to calculate against your annual allowance or money purchase annual allowance.**

**(iii) Amend contribution frequency**

Current frequency       Monthly       Quarterly       Half-yearly       Annually

New frequency       Monthly       Quarterly       Half-yearly       Annually

Effective date of amendment     

**(iv) Amend payment collection date**

Current payment date     

New payment date     

Effective date of amendment     

**(v) Suspend/reinstate/cancel regular contributions**

I wish to suspend existing contributions:

with immediate effect  or with effect from

I wish to reinstate existing contributions:

with immediate effect  or with effect from         <sup>2</sup>

I wish to cancel existing contributions:

with immediate effect  or with effect from

<sup>2</sup> Please note that the reinstatement date must be within 12 months of the suspension effective date. If you wish to reinstate a contribution after 12 months has elapsed, please complete a new SIPP Supplementary Contribution Form which is available on our website.

**2b Employer contributions (cont.)**

Applicant to complete

Signed Name Date Contact number   
(if different from details already given)**Please note** - Additional information on contributions is available in the notes section at the back of this document.**Please note** - For payments deducted from an employee's earnings, the due date these payments must be received by James Hay Partnership is the 19th of the month after the end of the calendar month in which the contributions were deducted from the employee's pay. For example if the deduction from the employee's salary is 29 April the due date is 19 May.**2c Third party contributions**

Applicant to complete

Please complete this section if you wish to make amendments to regular third party contributions.

Third party name Address   
  
  
Postcode Date of birth **(i) Amend contribution amount**Current amount £  (net) by Direct DebitNew amount £  (net) by Direct DebitEffective date of amendment **Please state the net amount that you would like to pay into your SIPP. If, as per Section 2, we are able to reclaim basic rate tax on your personal contributions, this tax amount will be added to your stated net contribution amount. Please therefore note that the gross figure (the net amount you are contributing plus the value of any tax reclaim) is the figure used to calculate against your annual allowance or money purchase annual allowance.****(ii) Amend contribution frequency**Current frequency  Monthly  Quarterly  Half-yearly  AnnuallyNew frequency  Monthly  Quarterly  Half-yearly  AnnuallyEffective date of amendment **(iii) Amend payment collection date**Current collection date New payment date Effective date of amendment **(iv) Suspend/reinstate/cancel regular contributions**

I wish to suspend existing contributions:

with immediate effect  or with effect from 

I wish to reinstate existing contributions:

with immediate effect  or with effect from <sup>3</sup>

I wish to cancel existing contributions:

with immediate effect  or with effect from <sup>3</sup> Please note that the reinstatement date must be within 12 months of the suspension effective date. If you wish to reinstate a contribution after 12 months has elapsed, please complete a new SIPP Supplementary Contribution Form which is available on our website.

Signed

Name

Date

Contact number

(if different from details already given)

## 3 Declaration

Applicant to complete

- a) I confirm that to the best of my knowledge and belief, the particulars given on this Form are correct and complete.
- b) I undertake to tell James Hay Partnership in writing within 30 days if:
- There is any change in my residency status
  - There is any change in my name or permanent residential address.
- c) I accept that if I have completed Section 2 "Entitlement to tax relief" then this form will be used by James Hay Partnership to assess my entitlement (if any) to tax relief.
- d) I agree that the total contributions to any registered pension schemes in respect of which I am entitled to tax relief will not exceed the higher of:
- £3,600, or
  - My relevant UK earnings for that tax year.
- e) If I am no longer entitled to tax relief on my contributions I undertake to tell James Hay Partnership in writing no later than:
- 5 April in the year of assessment in which this occurs, or
  - Within 30 days of this change.
- f) I accept it is an offence to make false statements and that the penalties are severe and could lead to prosecution.

Member's name

Member's signature

Date

       

## Notes

## Contributions

- Legislation requires James Hay Partnership to monitor payments into a personal pension scheme by employers from their own bank account in respect of the employee, or on behalf of the employee out of deductions from the employee's earnings. The legislation also states that the employer must specify the 'Due Date' for such payments.
- The employer must make sure that the payments are correct and paid on time. By law, James Hay Partnership must monitor the payments to ensure they are made on time using the Employer's Payment Record information provided.
- We must tell The Pensions Regulator if payments are missed or received late. The employer may be fined by The Pensions Regulator if late or incorrect payments are made.

We are able to provide literature in alternative formats. For a Braille, large print, audio or E-text version of this document call us on 03455 212 414 (or via the Typetalk service on 18001 03455 212 414).

James Hay Partnership is the trading name of James Hay Services Limited (JHS) (registered in Jersey number 77318); IPS Pensions Limited (IPS) (registered in England number 2601833); James Hay Administration Company Limited (JHAC) (registered in England number 4068398); James Hay Pension Trustees Limited (JHPT) (registered in England number 1435887); James Hay Wrap Managers Limited (JHWM) (registered in England number 4773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England number 7259308); PAL Trustees Limited (PAL) (registered in England number 1666419); Santhouse Pensioner Trustee Company Limited (SPTCL) (registered in England number 1670940); Sarum Trustees Limited (SarumTL) (registered in England number 1003681); Sealgrove Trustees Limited (STL) (registered in England number 1444964); The IPS Partnership Plc (IPS Plc) (registered in England number 1458445); Union Pension Trustees Limited (UPT) (registered in England number 2634371) and Union Pensions Trustees (London) Limited (UPTL) (registered in England number 1739546). JHS has its registered office at 2nd Floor, Gaspé House, 66-72 Esplanade, St Helier, Jersey, JE1 1GH. IPS, JHAC, JHPT, JHWM, JHWNC, SPTCL, SarumTL, IPS Plc, PAL, STL, UPT and UPTL have their registered office at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. JHAC, JHWM, IPS and IPS Plc are authorised and regulated by the Financial Conduct Authority. The provision of Small Self Administered Schemes (SSAS) and trustee and/or administration services for SSAS are not regulated by the FCA. Therefore, IPS and IPS Plc are not regulated by the FCA in relation to these schemes or services. (04/19)