

## Member Details

Name	<input type="text"/>
Date of Birth	<input type="text"/>
N.I. Number	<input type="text"/>
Plan Number <i>(if known)</i>	<input type="text"/>

## Are you entitled to tax relief?

Please tick the box which applies to your current situation

- A  I have relevant UK earnings chargeable to income tax or general earnings from overseas Crown employment subjects to UK tax, in this tax year
- B  I have or will have been resident in the UK at some time during this year
- C  I, or my spouse/civil partner, are in overseas Crown employment, but for this tax year do not have general earnings from overseas Crown employment subjects to UK tax
- D  My spouse/civil partner has for this tax year general earnings from overseas Crown employment subject to UK tax
- E  Not Eligible for Tax Relief

If you have selected box A or B Intelligent Money will reclaim basic rate tax on your personal contributions.

If you have ticked boxes C or D then we will claim basic rate tax up to the current maximum of £3600 gross of your personal contributions.

If you have selected E we will not be able to reclaim any basic rate tax relief on your personal contribution.

Source of Wealth	<input type="text"/>
Annual Earnings	£ <input type="text"/>

## MPAA

Have you previously taken taxable income from any flexi-access or flexible drawdown arrangement?  
(Please note this includes UFPLS payments).

Yes  No

For members who've taken taxable income via flexi-access drawdown, flexible drawdown or via UFPLS from any pension, scheme contributions must not exceed £4,000.

## CONTRIBUTION DETAILS

Personal Contribution (if applicable)

Single Net Amount	£ <input type="text"/>
Regular Net Amount	£ <input type="text"/>
Frequency	<input type="text"/> Monthly/Quarterly/Annually
Start Date	<input type="text"/> <i>(must be 1st or 14th of the month and more than 10 working days in the future)</i>
Email Address	<input type="text"/>

Single contributions should be made by Electronic Transfer payable to your Pension account. Bank details will follow via an encrypted email, please provide the email address you wish the details to be sent to above.

For contributions over the £40,000 gross please request our Contribution Carry-Forward Application form.

Please note that we will require proof of the client's income for this tax year. We are unable to reclaim tax relief without this.

## Employer Contribution (if applicable)

Single Gross Amount	<input type="text" value="£"/>	
Regular Gross Amount	<input type="text" value="£"/>	
Frequency	<input type="text"/>	Monthly/Quarterly/Annually
Start Date	<input type="text"/>	<i>(must be 1st or 14th of the month and more than 10 working days in the future)</i>
Employer Name	<input type="text"/>	
Company reg. No.	<input type="text"/>	
Contact	<input type="text"/>	
Contact Email	<input type="text"/>	
Contact Telephone	<input type="text"/>	

Single contributions should be made by Electronic Transfer payable to your Pension account. Bank details will follow via an encrypted email, please provide the email address you wish the details to be sent to above.

One Direct Debit Mandate is enclosed, for additional mandates please visit [www.intelligentmoney.com/DDM](http://www.intelligentmoney.com/DDM). If you're instructing us to set up multiple contributions, please indicate which contribution should be collected using each mandate.

For contributions over £40,000 gross please request our Contribution Carry-Forward Application form.

## Investment Instructions



# Direct Debit Instruction

Please complete the whole form using a ball point pen and return it to:

Service User Number:

Intelligent Money, The Shire Hall, High Pavement, Nottingham. NG1 1 HN

4 3 7 2 4 5

Name(s) of Account Holder(s)

[Empty box for Name(s) of Account Holder(s)]

Date:

Bank/Building Society Account No

Sort Code

[Empty boxes for Bank/Building Society Account No]

[Empty boxes for Sort Code]

Name and full postal address of your Bank or Building Society

[Empty box for Name and full postal address of your Bank or Building Society]

### Instructions to your Bank or Building Society:

Please pay Intelligent Money 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 Intelligent Money and, if so, details will be passed electronically to my Bank/Building Society.

Signature

Date

Reference:

[Empty boxes for Reference]

For Intelligent Money use only

**Intelligent Money –  
FOR OFFICE USE ONLY**

[Empty box for Office Use Only]

Banks and Building Societies may not accept Direct Debit Instructions for some types of accounts.

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, Intelligent Money will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Intelligent Money 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 Intelligent Money 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 Intelligent Money 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.