

# Financial Adviser Remuneration payment authorisation



## Financial Adviser details

By signing this section you are giving authorisation for Dentons Pension Management Ltd (Dentons), the Administrator of the Plan, to agree to pay the Authorised firm named below and the payment will be made directly from the default bank account in the accordance with the provisions of your SIPP until otherwise instructed by you in writing. This payment does not include any fee that may be due to Dentons.

Reference number	<input type="text"/>
Member name	<input type="text"/>
Adviser name	<input type="text"/>
Name of Company	<input type="text"/>
Company FCA reference number	<input type="text"/>

## Initial payment

Do not complete if the Financial Adviser remuneration is being taken directly by the investment manager/platform.

Specified payment of	<input type="text" value="£"/>	or
payment of	<input type="text"/> % of the initial Plan fund	being* <input type="text" value="£ FOR OFFICE USE"/>

## Annual renewal payment

Do not complete if the Financial Adviser remuneration is being taken directly by the investment manager/platform.

Specified annual payment of	<input type="text" value="£"/>	or
annual payment of	<input type="text"/> % of the initial Plan fund	being* <input type="text" value="£ FOR OFFICE USE"/>

Frequency of payment ☐ Quarterly ☐ Half yearly ☐ Annually

Please pay the regulated financial adviser's firms bank

Bank	<input type="text"/>
Sort Code Number	<input type="text"/>
Account Name	<input type="text"/>
Account 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"/> <input type="text"/>
Quoting the reference	<input type="text"/>
SIPP Name	<input type="text"/>

### Please note:

Please do not complete this section if the Financial Adviser is to be remunerated directly by the investment manager.

### \*Please note:

If you are paying a percentage of the fund to the stated Financial Adviser you can leave the amount clear as this will be calculated based on the actual amount invested.

### Please note:

Without this information we will be unable to process any adviser remuneration payment request.

**To be completed by the Financial Adviser named above**

I understand that I will only be remunerated from the SIPP for advice that I have given to this client on:

SIPP establishment	Yes <input type="checkbox"/>	No <input type="checkbox"/>
SIPP transfers/contributions	Yes <input type="checkbox"/>	No <input type="checkbox"/>
SIPP investments	Yes <input type="checkbox"/>	No <input type="checkbox"/>
SIPP access retirement benefits	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**Financial Adviser Signature**

**Date** (DD/MM/YYYY)
**Financial Adviser name**

**Please note:**

**Without this information we will be unable to process any adviser remuneration payment request.**

**To be signed by the client who has received the financial advice:**

- I authorise Dentons to pay my adviser the adviser charges from my default bank account as specified above
- I confirm that any adviser charges are genuinely commercial arrangements between myself and my adviser
- I request that Dentons acts on these instructions in accordance with the provision of my SIPP until otherwise instructed by me in writing
- I confirm that I am responsible for notifying Dentons in writing of any change to my financial adviser or any change in fees
- I understand that Dentons will only pay remuneration if the Financial Adviser is authorised and regulated by the Financial Conduct Authority. In the event that I change my financial adviser or wish to cease payments to the Financial adviser I acknowledge it is my responsibility to provide Dentons in writing with revised instructions.

**Member signature**

**Date** (DD/MM/YYYY)
**Member name**


## Changing Financial Adviser

You should let us know in writing/by email as soon as possible if you change your financial adviser. From the time we are notified, we will stop paying any ongoing adviser charges but will continue to pay any outstanding initial adviser charges unless you specifically advise us otherwise.

If you wish to appoint a new financial adviser we will need you to complete a new Financial Adviser agreement.



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Dentons Pension Management Limited, Denton & Co. Trustees Limited, NTS Trustees Limited, TP Trustees Limited, Sippchoice Trustees Limited, Fairmount Trustee Services Limited and M.A.B. Trustee Company Limited are registered in England & Wales under numbers 02352951, 01939029, 01407848, 02604059, 06869793, 01909678 and 01604556 respectively. Registered office at Sutton House, Weyside Park, Catteshall Lane, Godalming, Surrey, GU7 1XE.

Dentons Pension Management Limited is authorised and regulated by the Financial Conduct Authority, register number 461094.

VAT number for Dentons Pension Management Limited is 863 1639 14.