

## Request to Switch SIPP

This form is to allow you to switch between the **SimplySIPP** and the **Xafinity SIPP**.

Text in this colour refers to the **SimplySIPP**.

## Your Details

<b>Your full name</b>		
<b>Current SIPP Number</b>		
<b>Which version do you want to switch to?</b>	<b>The Xafinity SIPP (full investment flexibility)</b>	<input type="checkbox"/>
	<b>The SimplySIPP (limited investment flexibility)</b>	<input type="checkbox"/>

## Your Financial Adviser

<b>Did your Financial Adviser advise you to switch SIPPs?</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>Will your Financial Adviser be the same as at present?</b>	Yes <input type="checkbox"/>	No* <input type="checkbox"/>
<b>Will your Financial Adviser be paid on the same basis as for your current SIPP?</b>	Yes <input type="checkbox"/>	No* <input type="checkbox"/>

\*If no, please complete and attach revised IFA remuneration agreement pages from a standard application form.

## Your Declaration

<p><b>For your own benefit and protection, before signing this Declaration, you should carefully read the Charges Card for your new choice of SIPP. All the other documents that we will rely on in providing the SIPP were given to you when you took out your SIPP and these will remain in place to govern your new choice of SIPP. If you do not understand any point please refer to your Financial Adviser.</b></p> <p><b>By signing below I confirm that:</b></p> <ul style="list-style-type: none"> <li>I have received a copy of the Charges Card for the version of the SIPP I wish to switch to.</li> <li>Xafinity will rely on the Charges Card, and the documents I received when I took out my current SIPP, in providing me with my SIPP.</li> <li>The declarations I made when I took out my current SIPP still apply to the new SIPP version.</li> </ul>	
<b>Applicant's signature:</b>	
<b>Applicant's name:</b>	
<b>Date of signing (dd/mm/yyyy):</b>	

**Return to : SIPP Department, Xafinity SIPP Services Ltd, Scotia House, Castle Business Park, Stirling, FK9 4TZ**