



# Application for a SIPP Scheme Holding Physical Gold.

The following document represents an application for a Self Invested Personal Pension account and should be read with diligence. It is required that the document is signed by both an authorised representative of the SIPP trustee company and the underlying Member of the SIPP.

Upon completion please return the original copy to your pension provider.

Should you have any questions please contact Sharps Pixley on:

+44 (0) 207 871 0532 or email [pension@sharpspixley.com](mailto:pension@sharpspixley.com)

Sharps Pixley Ltd, 54 St James's Street, London SW1A 1JT

Company Number 06629106

## 1. Details of Scheme

SIPP Name:
Scheme Reference Number:
Name of SIPP Provider:
Address:
Postcode:

SIPP Trustee Name:
Address:
Postcode:
Daytime Telephone Number:
Email Address:

## 2. Details of Member

Name of Member:
Address:
Postcode:
Daytime Telephone Number:
Email Address:
Date of Birth: (DD/MM/YYYY)
National Insurance Number:

### 3. Scheme Bank Account Details (given by SIPP provider)

Account Name:
Bank Name:
Branch Address:
Postcode:
Account Number:
Sort Code:
Reference for payments back to this account:

*Important to note that Sharps Pixley will only make payments to the above account. Any change to this must be authorised by your SIPP provider.*

### 4. Identity Verification

We require two forms of ID documents for the Member and Trustee to be returned with this completed form. One should be a photo ID such as passport or driving licence and the second should be a utility bill or bank statement which is less than 3 months old.

### 5. Data Protection

By completing this document the signatories below confirm their approval for Sharps Pixley to use the information provided in order to meet legal and regulatory obligations and for any other purposes considered necessary.

### 6. Storage Fees

The fee for fully insured vaulting is 0.3% p.a based on the market value of the gold. The initial term, two years storage, must be paid in advance at time of purchase. Sharps Pixley will add a 0.6% premium to the purchase price to reflect this fee. Any fees thereafter will accrue and be settled when the gold is subsequently sold. You will receive the sale proceeds less or plus any fees that have either accrued or were already paid in advance, depending on the investment term.

### 7. Declaration

We hereby:

- Request that a bullion account be opened with Sharps Pixley.
- Understand that it is the HMRC requirement that bullion held in your SIPP must remain within the vaulting arrangement.

- Understand and agree to Sharps Pixley's Terms and Conditions for Pension Scheme Custody and that storage costs will apply for this service as outlined above.
- Understand that as per the HMRC requirement, the investment will be restricted to investment grade gold bars with a purity of no less than 995 eligible to be held within your SIPP. It is not possible to hold silver, platinum, palladium or gold coins within your pension.
- Confirm that a SIPP account exists for the Member specified in Section 2 and that the Rules of the SIPP permit the purchase of gold bullion.
- Declare that the SIPP trustee consents to the Member undertaking trading activity on behalf of the SIPP via Sharps Pixley.
- Understand that once confirmed, it is not possible to cancel an order. The Sharps Pixley prices are determined by live gold prices so consequently there is no statutory right to return or cancel an order once placed under the Consumer Contracts Regulations 2013.

**Signed for and on behalf of the SIPP trustee**

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Print Name

Date:

For and on behalf of:

**Signed by the SIPP Member**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

Date: