

# Data Capture Form

UK SIPP



This document cannot be sent to Novia Global as an application form. This document serves as an aide-memoir to ensure that you collate all of the information required to submit an application online through the Novia Global platform.

Client Details	
Investor Type	Professional <input type="checkbox"/> Retail <input type="checkbox"/>
Client Name(s)	<input type="text"/>
Date(s) of Birth	<input type="text"/> Gender <input type="text"/>
Nationality	<input type="text"/>
Country of Birth	<input type="text"/>
Tax ID Number	<input type="text"/>
Tax Residency	<input type="text"/>
Occupation	<input type="text"/>
Reporting Currency	<input type="text"/>
Residential Address (including postal code)	<input type="text"/>
Home Telephone	<input type="text"/> Work Telephone <input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/>
Advice Given In	<input type="text"/>
Bank	BIC Code IBAN Account Name Account

## Product Details

Novia Global UK SIPP Product	Uncrystallised		Drawdown	
Employment Status				
Annual Salary				
N.I. Number				
Preferred Retirement Age (Uncrystallised only)				
Money Purchase Annual Allowance Triggered?		If Yes, MPAA Date		

## Transfer Details

Transfer Scheme Name				
Address (Including Postal Code)				
Transferring Scheme Reference				
Partial Transfer?	Yes		No	
Is this a Defined Benefits Transfer?	Yes		No	

### If Yes:

Deadline Date for Defined Benefit				
Employer Name				
Occupation and Industry at Time of Contribution				
Length of Service				

### If No:

Occupation and Industry at Time of Contribution				
Term Contributed (month/years)				
Average Annual Contribution				
Is this a ROPS Transfer?	Yes		No	
Estimated Transfer Value				

## Adviser Details

Adviser Name

Adviser Firm

## Adviser Charges

Initial

% or

Amount

Ongoing

% or

Amount

## Client Signature

Client Signature

Signature for adviser's own records only.



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