

The smart investment platform



Adding an additional transfer to an existing uncrystallised SIPP

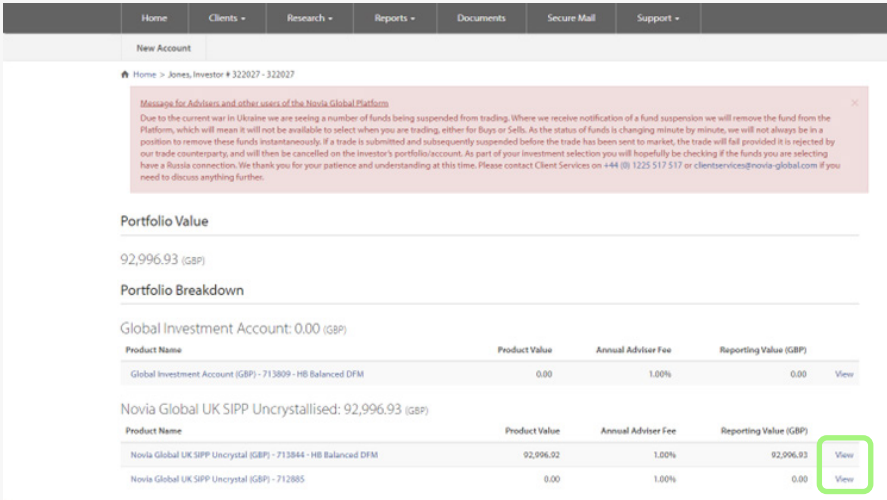
User Guide

Additional Transfers

This guide will detail the steps required to add an additional transfer to an existing uncrystallised SIPP. To add an additional transfer to an existing crystallised SIPP, a new SIPP will need to be created.

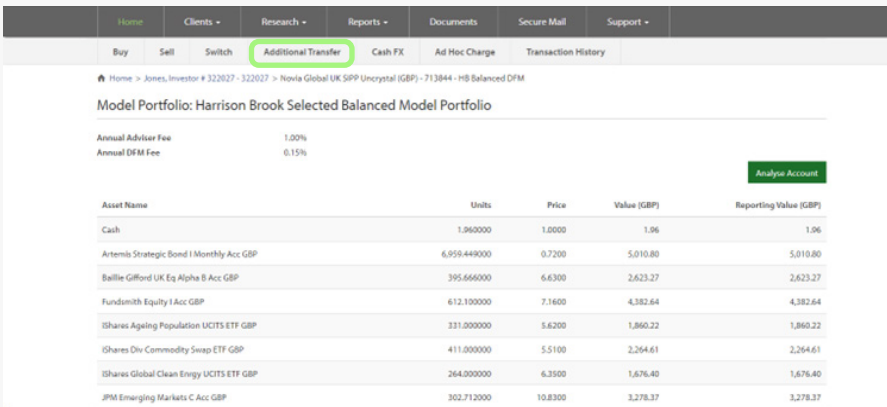
Step 1

Select the existing SIPP account from the homescreen.



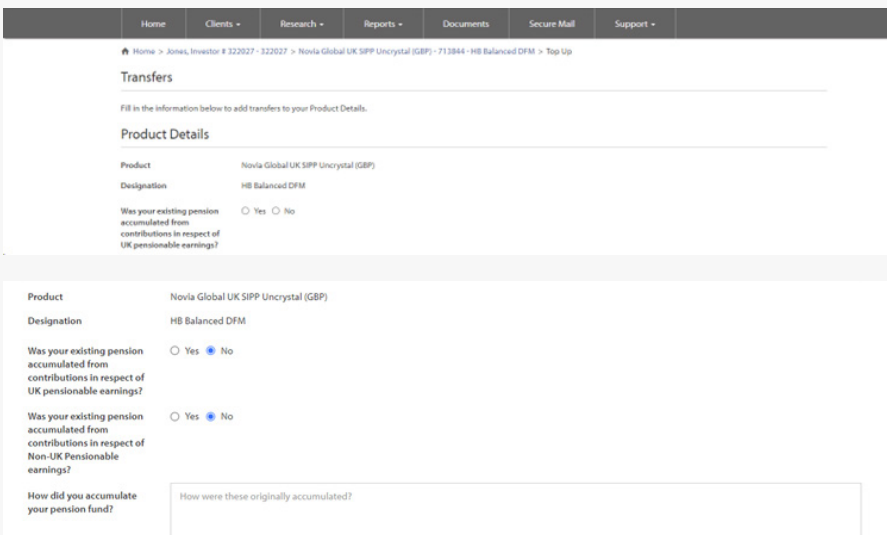
Step 2

Select "Additional Transfer" from the secondary navigation bar.



Step 3

Complete the Product Details and Source of Wealth information.



If you answer "No" to the UK Pensionable Earnings question, please clarify in the space provided.

Step 4

Fill in the "Transfer Details" section and then click "Add Transfer"

Transfer Details

Transferring Scheme Name

Address Line 1

Address Line 2

Address Line 3

City

Postcode

Country

Transferring Scheme Reference

Partial Transfer? Yes No

Is this a Defined Benefit Transfer? Yes No

Is it a ROPS Transfer? Yes No

Estimated Transfer Value (Uncrystallised)

Add Transfer

Step 5

If applicable, complete the "Initial" and "Ongoing" charges information for the transfer.

Home > Jones, Investor # 322027 - 322027 > Novia Global UK SIPP Uncrystal (GBP) - 713844 - HB Balanced DFM > Top Up

Charges

Client Charge Type: Charge Type C

Initial Charges

Percentage Amount

Transferring Scheme	Transferring Scheme Reference	Amount	Charge
Aviva	Baker12	123000	1

Ongoing Charges - Annual

Ongoing Annual Charge Value: 1.00%

Back Next

Step 6

Confirm that you have read and understand the SIPP Declaration and then click "Submit".

Novia SIPP Declaration:

In addition to the above general declarations, where the application is for the Novia SIPP:

I am submitting this Application only when the Applicant has provided the required information, declaration and authority. I confirm that the Applicant has authorised submission of this Application on their behalf and that they are eligible for the Novia SIPP.

The Applicant declares that they are applying for a Novia SIPP and that:

- They are eligible for the Novia SIPP.
- They understand that the value of their Plan may only be applied to provide benefits in accordance with the Terms & Conditions of the Novia SIPP.
- They consent to Novia requesting the transfer of their entitlement to benefits from the schemes shown in the SIPP Transfer Details.
- That the information given is correct and complete to the best of their knowledge and belief.
- They agree to indemnify Novia as the scheme administrator against any liability to pay any tax or other charges which rise out of provision of false or misleading information.
- They have read and understood the Novia SIPP Terms & Conditions and the SIPP Key Features Document.
- They further undertake to be bound by the Novia Terms & Conditions.
- Novia has the right to liquidate investments sufficient to pay benefits, fees and charges at its sole discretion if they, or I, fail to give adequate instructions in that respect.
- If appropriate, Novia has their authority to check with HM Revenue & Customs the details of any certificate which they supply which enhances their lifetime allowance.

Verification of identity

I confirm that the applicant's name, address, and date of birth information in the - I confirm that the applicant's name, address, and date of birth information in the application was obtained by me. I also confirm the evidence I used and recorded in this regard was in line with the standards I am contracted to by Novia Global Limited through the Terms of Business.

Identification and verification documents are required before trading of a client's assets can commence.

I confirm that the Applicant(s) have read and accept the Terms and Conditions

Back Submit

Step 7

Upon submission, you will have the opportunity to download the "Top-Up Summary" and "Transfer Authority documents."

Home > Top Up

Complete

Your request has been successfully submitted

Top Up Application Summary

Transfer Authority

Finish