

International Expat SIPP

Information-Only Adviser Setup (Jurisdiction)

Form 5



The Trustee

will only accept this form if it is correctly and fully completed.

Any questions, call
+44 (0) 1525 408120

Please note

Please complete this form if you have changed your country of residence which means your adviser is licensed outside of your new residence jurisdiction, or if you wish to appoint a new adviser who is licensed in a different jurisdiction to the one you currently reside in, to receive information on your pension account.

When complete

email or post this form:

ivcm@heritagepensions.co.uk

Heritage Pensions Limited

6 Doolittle Mill, Froghall Road,
Ampthill, Bedfordshire,
MK45 2ND

Tel.: +44 (0) 1525 408120

Fax: +44 (0) 1525 403189

Member Name

Declaration and Signature

I confirm that I am aware that my adviser is not licensed in my current country of residence. I wish for the adviser firm detailed below to continue to have information rights to my pension fund. I have entered into this agreement on an informed basis after carrying out my own research.

I understand that as this is an information only arrangement between myself and my adviser, that all requests for amendments of any kind to my pension will come directly from me on an execution only basis, including any fund or investment changes.

I understand that no fees can be paid from my investment portfolio and any fees I authorise to be paid from my SIPP Bank Account can only be for administration services, and you must receive an invoice from the Adviser Firm for any administration services.

I therefore understand that both Heritage Pensions Limited and International SIPP Trustees Limited are not responsible for the decision to undertake this transaction. I also understand that neither Heritage Pensions Limited nor International SIPP Trustees Limited provide any financial advice whatsoever.

I confirm I have read and understood the Terms & Conditions for the International Expat SIPP prior to signing this declaration and that I have had the opportunity to ask any questions related to the transaction.

I am aware that neither Heritage Pensions Limited nor International SIPP Trustees Limited will be liable for any rights to redress relating to my decision to appoint an information only based adviser firm.

I understand that I have no recourse to complain to any regulatory body or ombudsman either in my country of residence or in the jurisdictions the adviser firm is based in.

Adviser Name

Contact Number

Address

Member Signature

Date

[dd/mm/yy]

The International Expat SIPP is operated and administered by Heritage Pensions Limited who are authorised and regulated by the Financial Conduct Authority. The asset trustees for the International Expat SIPP is International SIPP Trustees Limited. An agreement is in place between Heritage Pensions Limited and IVCM whereby certain administrative functions in respect of the International Expat SIPP are outsourced to and undertaken by IVCM.