

IVCM Heritage SIPP

Set Up Financial Adviser Regulated in Other Jurisdiction for Information Only Form

The IVCM Heritage SIPP is operated and administered by PSG SIPP Limited.

The asset trustee for the IVCM Heritage SIPP is Heritage Trustees Limited.

An agreement is in place between PSG SIPP Limited and IVCM whereby certain administrative functions in respect of the IVCM Heritage SIPP are outsourced to and undertaken by IVCM.

PSG SIPP Limited

6 Doolittle Mill
Froghall Road
Ampthill, Bedfordshire
MK45 2ND

PSG SIPP Limited is authorised and regulated by the Financial Conduct Authority with registration number 514654.

PSG SIPP Limited is a wholly owned subsidiary of Basi and Basi Financial Planning Limited.

1 Member

SIPP reference number

2 Financial Adviser

Name of adviser

Name of firm

Address

Country

Postcode

Telephone numbers

Office

Mobile

Email address

3 Declaration

I confirm that I am aware that this financial adviser and their firm is not licensed in my current country of residence. I wish for the adviser's firm 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 all requests for amendments of any kind to my SIPP 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 must only be for administration services. For the payment to be made I understand that you must receive an invoice from the adviser's firm.

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

I confirm I have read and understood the Terms & Conditions for the IVCM Heritage 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 PSG SIPP Limited nor Heritage 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's firm is based in.

Signature

Name

Dated