

Suffolk Life Self-Invested Pensions Regular Investment and Amendment Form



1 Intermediary Details (For Intermediary use only)

Cofunds Intermediary Authorisation Code

Intermediary Client/Deal Ref.

Marketing Code

The purpose of this application form is to set up a new regular Cofunds Platform Funds investment into your Suffolk Life Self-Invested Pension or to amend an existing regular investment into Cofunds Platform Funds within your SIPP. Please tick (✓) ONE of the following options:

New regular investment **OR**

Amendment of an existing regular investment

The regular investment collection date will be the 11th or next available working day from the SIPP Bank Account. You are unable to set up a new or amend an existing regular investment at the same time via this application form. You must submit separate application forms.

You cannot create or amend existing regular pension contributions for your Self-Invested Pension via this application form. Creating or amending the regular investment to Cofunds Platform Funds will not change the amount of any existing regular pension contribution payments. If you wish to commence, amend or cancel a regular pension contribution payment, please speak to your Nominated Intermediary.

Please complete this application form using black ink in BLOCK CAPITALS and return to: **Suffolk Life, 153 Princes Street, Ipswich IP1 1QJ**

2 Investor Details (Please complete this section in full)

Existing Cofunds Client Reference

Suffolk Life Plan Number

Mr/Mrs/Ms/Miss/Other

Surname

Full First Name(s)

Current Permanent Residential Address

Postcode

Male Female Date of Birth / /
 D D M M Y Y Y Y

Time at this Address yrs mths

3 Regular Investment Cancellation

Only complete this section if you are cancelling an existing regular investment amount in its entirety. If you are setting up a new or amending a regular investment, please go to the next section.

Please tick this box if you wish to cancel your regular investment into Cofunds held under your Self-Invested Pension. Cancellation requests must be received 5 working days prior to the 11th of the month to be cancelled within the same month. If you complete this section please go to section 7.

4 Income

Indicate here where you would like income generated from income producing funds to be paid. If you are amending an existing regular investment, choosing one of the options below will alter where income is being paid for all Cofunds Platform Funds held under your Self-Invested Pension. In the absence of any instruction, any income generated will be re-invested or will follow your previous instruction.

Re-invested **OR**

Paid into Cofunds Trading Account

5 Regular Investment Amendment Details

Only complete this section if you are amending an existing regular investment. If you are setting up a new regular investment, please go to the next section. Please enter here your new regular investment amount. The new regular investment amount you enter below must equal the total regular investment amount entered in section 6.

Existing regular investment amount:

New regular investment amount:

