embark pensions

Adviser Charge Form

This form confirms the charges you've agreed to pay to your financial adviser and is your instruction to EBS Pensions Limited, trading as Embark Pensions to facilitate the payment of these charges from your pension plan and pass them on to your financial adviser.

You need to complete a new Adviser Charge Form if you want to instruct us to pay further ad-hoc adviser charges.

If you've any questions concerning your adviser charge please speak with your financial adviser.

SECTION 1 - FINANCIAL ADVISER DETAILS

If you are transferring existing pensions into the SIPP, we will require additional information to complete the transfer.

Financial adviser firm name

Adviser contact name

SECTION 2 - MEMBER DETAILS

Title: Forename(s): Surname:

Date of Birth: National Insurance Number:

Ref:

Email Address:

SECTION 3 - AD-HOC ADVISER CHARGE

The effective date of this charge wil be the date we receive this form.

Agreed Fees to be paid from the SIPP to the Financial Adviser £ or % Is this charge subject to VAT?

Date fee to be paid D D M M Y Y Y Y or immediate

Please sign to confirm your agreement that the above detailed fees be paid to your adviser and that any change to your financial adviser or any change in fees will be supplied in writing.

Client: Date:

Dunscar House, Deakins Business Park, Egerton, Bolton BL7 9RP

01204 803500 // customerservices@embarkpensions.co.uk // embarkpensions.co.uk