

How to... ..set up a new Brooks Macdonald Premier SIPP

Step One

Obtain a Brooks Macdonald Premier SIPP Application Pack, Terms and Conditions, Managed Portfolio Service application form and Product Factsheet.

You can download these from the IFA Zone of the Premier Pension Services website at (www.premierpensionservices.co.uk) or call Francesca Federico on Sales Support - 029 2055 7000. The following application forms are needed to set up the scheme:

- Brooks Macdonald Managed Portfolio Services application form.
- Premier SIPP Member Application Form
- Premier SIPP Member Agreement

Step Two

Complete your Application Documentation.

You will need to complete and sign the Member Application Form on the Declaration Page.

You should also read carefully the Waiver Notice. If you want to waive your right to cancel and establish your SIPP as soon as possible, please sign the Waiver Form.

You will also need to sign the Member's Agreement, and arrange for this document to be witnessed independently (no family members).

Complete and sign the Brooks Macdonald Managed Services Application form.

Step Three

Return your Application Documentation to:

Premier Pension Services
Fitzalan House,
Fitzalan Court,
Fitzalan Road,
Cardiff, CF24 0EL

Your application will be acknowledged within 48 hours of receipt.

Step Four

Premier Pension Services (PPS) will establish your Brooks Macdonald Premier SIPP, which will include your SIPP member bank account.

PPS will liaise with you and your IFA on the collection of contributions and transfer values - and reclaim tax relief where appropriate.

All funds once collected will be transferred to the member's Brooks Macdonald investment account.

PPS will operate a SIPP member bank account for the receipt of contributions, tax relief, payment of fees, income etc. There may at any time be small cash balances in this account.