

Self Managed Investment Request Form

Please complete this form if you wish to manage your own investment portfolio/funds.

I request London & Colonial Services Limited ("London & Colonial") as Trustees of my SIPP to open an account with one of the following Investment Providers:

Please select:

RateSetter Stocktrade

I confirm that I have received and read the following (please tick)

- i. Permitted Investments List
- ii. Permitted Investments Guidance Notes
- iii. Permitted Investments Explanatory Notes
- iv. SIPP Member Trading Agreement

These documents are available via www.londoncolonial.com/downloads/simple-investment-sipp

I understand that London & Colonial will invest the maximum available (subject to liquidity requirements)* with my chosen Investment Provider.

All investment payments to UK Investment Providers will be made by BACS transfer. If you require same day payment by CHAPS, please tick the following box

All payments by CHAPS will incur an additional bank payment charge, please refer to our current Schedule of Fees for current banking charges.

Member Signature	
Member Full Name	
Member Number	
Date	DDMMYYYY
Contact number	
Next Steps Checklist:	(Should we need to contact you in relation to this form)
	 Sign and return this form Sign and return the SIPP Member Trading Agreement

Please return signed and completed forms to:

London & Colonial, 38 – 42 Perrymount Road, Haywards Heath, West Sussex RH16 3DN

*For RateSetter investments the trustees will retain the equivalent of 4 years fees in your HSBC SIPP account.

www.londoncolonial.com

Page 1 of 1

NBI SMIR Nov 2015

London & Colonial Holdings Limited, London & Colonial Services Limited, London & Colonial Central Services Limited and London & Colonial Trustees Limited are registered in England and Wales. Registered numbers 4093489, 2966313, 7966194, 2275364 respectively. Registered office at 38-42 Perrymount Road, Haywards Heath, West Sussex RH16 3DN. London & Colonial Services Limited is authorised and regulated by the Financial Conduct Authority. London & Colonial Assurance plc and London & Colonial (Trustee Services) Limited are registered in Gibraltar. Registered numbers 80650 and 102550 respectively. Registered office PO Box 199, 57-63 Line Wall Road, Gibraltar. London & Colonial Assurance plc and London & Colonial (Trustee Services) Limited are authorised by the Gibraltar Financial Services Commission.