

## CURTIS BANKS SELF-INVESTED PENSIONS REGULAR INVESTMENT AND AMENDMENT FORM

for existing clients

This form is used to set up or amend your regular investments into an existing Suffolk Life SIPP, Smart SIPP or Master SIPP, or Curtis Banks Your Future SIPP through Aegon.

This form is not to create or amend your existing regular pension contributions being paid to your SIPP. Amending the regular investment on Aegon will not change the amount collected for your regular pension contributions.

If you wish to start, amend, or cancel a regular pension contribution payment, please speak to your adviser/intermediary.

The regular investment collection date will be the 11th or next available working day from the SIPP Bank Account.



Please complete this form and return to:  
**Curtis Banks, 153 Princes Street, Ipswich, IP1 1QJ**

### Section 1

#### Client details

##### 1A. Existing client details

Product number	8							
Mr/Mrs/Miss/Ms/Other - please specify								
Full forename(s)								
Surname								
Curtis Banks plan number								
Date of birth			/			/		

When completing date fields please use the usual **DD/MM/YYYY** format.



##### 1B. Client address details

Permanent residential address	
	Postcode

### Section 2

#### Regular investment amendment details

##### 2A. Regular investment type (please tick one of the following options)

I wish to:

Set up a new regular investment	<input type="checkbox"/>
Amend an existing regular investment - <i>please complete Section 2B</i>	<input type="checkbox"/>
Cancel an existing regular investment	<input type="checkbox"/>

Cancellation requests must be received five working days prior to the 11th of the month to be cancelled within the same month.



##### 2B. Regular investment amendment details

Please enter your existing and new regular investment amounts here.

Existing regular investment amount:	£
New regular investment amount:	£

Only complete this section if you wish to amend the regular investment amount.



If you wish to amend the funds your existing regular investment is currently in, you should complete a Regular investment strategy instruction (for third party pension products) form. If you have not told us the funds you want to invest in, please complete an Investment strategy instruction form.

### Section 3

### Adviser/Intermediary details (for adviser/intermediary use only)

Intermediary name

Firm name

### Section 4

### Authorisation (for adviser/intermediary use only)

I hereby confirm I have my client's authority to set-up, amend or cancel this regular investment instruction. I confirm that I have provided my client with the details of the fees and charges appropriate to their investment. I confirm that my client has received the relevant documents and agrees to be legally bound by the content of the Aegon Platform terms and conditions and the Curtis Banks SIPP supplement, understands there are fees associated with the Aegon Platform (the annual charge) and has provided to me written authorisation for Aegon to collect the annual charge in accordance with the Aegon Platform terms and conditions and the Curtis Banks SIPP supplement.

Adviser/intermediary  
Signature

Date   /   /

#### Office use only (Curtis Banks)

Curtis Banks confirms the adviser/intermediary has the customer authority to sign this instruction on their behalf.

Curtis Banks Signature

Date   /   /

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 604 4001 (call charges will vary) or visit [aegon.co.uk/contact](https://aegon.co.uk/contact)

We're always here to help so if you need some additional support from us please let us know.

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