

For employers

Record of payments due

This form is to be completed by the employer who is making regular contributions to an Aegon Retirement Choices Self-invested Personal Pension (SIPP) or One Retirement plan.

You must notify us of any changes to these payments. If you fail to complete this form we're unable to monitor payments as detailed in accordance with the Pensions Act 2004, and you may be reported to The Pensions Regulator.

If you're deducting the employee's contributions from their net salary, these must be received by us no later than 22 days (19 days if payment is by cheque) after the end of the month in which the deduction was made.

Please email completed form to clientsupport@arc.aegon.co.uk.

Please complete this form in **BLOCK CAPITALS** and ballpoint pen.

1. Member details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

National Insurance (NI) number

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2. Employer details

Employer name

Person dealing with correspondence

Address

Postcode

Company registration number

Contact telephone number (for any questions)

3. Regular contribution details

Monthly contributions

Employer
(gross)

Salary Sacrifice
(gross)

from employee's
gross income

Employee contribution
(net)

from employee's net
income, we add basic
rate tax to this

Do you want to increase regular contributions each year? No Yes, by the Retail Price Index (RPI)

What month will the contributions start?

If we receive the completed form and Direct Debit instruction:

- by the 15th* of the month, contributions will start on the 2nd** of the following month;
- after the 15th of the month, contributions will start on the 2nd** of the month after the following month.

*or the last business day before, if the 15th is a weekend or a bank holiday.

**or the next available business day, if the 2nd is a weekend or a bank holiday.

Business day is any full day on which banks, investment managers and the London Stock Exchange are open for business.

4. Declaration

In this declaration, 'we' means the employer and 'you' means Aegon.

- 4.1 We declare that to the best of our knowledge and belief, the statements made in this section and any related documents are correct and complete and that we haven't concealed any material fact.
- 4.2 We agree to pay you regular contributions for the member (named in section 1).
- 4.3 Although we can contribute to the member's benefits, the contracts exist between the member and you.
- 4.4 We'll be responsible for dealing and corresponding with you regarding the payment or non-payment of contributions for the member.
- 4.5 We undertake to advise you within 30 days of the member ceasing to be employed by us or where contributions are reduced or terminated.
- 4.6 If any payment due isn't received by you within 90 days of the due date or where you feel that non-payment is of significance, you may be required to advise The Pensions Regulator and the member.

4.7 It's our responsibility to ensure you're provided with relevant information to monitor payments and that should we fail to provide it we'll be reported to The Pensions Regulator.

4.8 We confirm that the member has provided consent for us to include their personal data within the schedules to be provided to you from time to time and used in accordance with the 'Data Protection' section in the terms and conditions.

4.9 You may make our personal information available to a third party by electronic or other means for the purpose of verifying identity in accordance with the Money Laundering Regulations.

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		2	0		

Print name

Employer's signature – Signature not required if sending form by email

X		X
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