

Contributions Form

Personal Details

Forenames		Title	
Surname		N.I. Number	
Date of Birth	/ /		

Employment Status

Employed	☐	Pensioner	☐
Self Employed	☐	Unemployed	☐
Other	☐	Please provide details	
Current salary	£		
Name of Employer			
Address			
Contact name			
Position			

Contribution Details

Member's Net Personal Contribution	£		
Employer's Gross Contribution	£		
Frequency of Contribution (Please also complete a standing order form for regular contributions.)			
One-off	☐	Annual	☐
Quarterly	☐	Monthly	☐
Start date for regular contributions	/ /		
Personal Contributions paid to all Registered Pension Schemes this tax year	£		
Employer Contributions paid to all Registered Pension Schemes this tax year	£		

Member Declaration

This declaration should be signed by all applicants.

I declare that:

To the best of my knowledge and belief, the statements included in this application are true and complete.

I confirm that I am a UK resident or I am overseas as a Crown Servant or spouse/partner of a Crown Servant.

I understand that I should advise the trustee in writing within 30 days if there is any change in my employment; any change in residency status; any change in my name or any change in my permanent resident address.

I understand that any contributions I wish to make must be made before my 75th birthday and that all personal contributions made to all Registered Pension Schemes must not exceed the higher of:

a) the basic amount (currently £3,600 gross)

b) 100% of my Relevant UK Earnings.

I understand that if my contributions in respect of a tax year exceed the Annual Allowance (currently £60,000), then I may be subject to an Annual Allowance tax charge.

I understand that if my "adjusted income" (including the value of any pension contribution) is over £260,000 per annum, my annual allowance will be reduced by £1 for every £2 of income above £200,000 subject to a maximum reduction of £50,000.

I understand that if I have flexibly accessed my Organon SIPP or any other money purchase pension I will be subject to a Money Purchase Annual Allowance limit, of £10,000 and that if my contributions exceed this amount I may be subject to an annual allowance tax charge.

I understand that I must inform Organon if I have flexibly accessed another money purchase pension scheme within 91 days of doing so.

If I am no longer entitled to tax relief on my contributions I will undertake to tell Organon SIPP Services Limited in writing and no later than 5 April in the year of assessment when this occurs or within 30 days of the change.

Date	/
Signed	
Name	