

Section 1 (Continued)

Email:

Please confirm the details of the of the bank from which the initial deposit is coming (alternatively you can send a cheque with the application)

Bank Account Name:

Sort Code:

Account Number:

Section 2

Corporate Trustee Details

Name:

Address:

Postcode:

Telephone:

Fax:

Email:

Section 3

Details of Member

For existing customers of SBI please provide your SBI Customer ID number:

Title (Mr./Mrs./Miss/Other):

Other Initials:

First Name:

Section 4

Financial Advisor

Name:

Address:

Postcode:

Financial Services Registration No.:

Section 5

A. Details of Corporate Trustee's Authorized Signatory

Title (Mr./Mrs./Miss/Other):

Other Initials:

First Name:

Surname:

Address:

Postcode:

Country:

Date of Birth:

D	D	/	M	M	/	Y	Y	Y	Y
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Section 5 (Continued)

Nationality:

Passport Number:

Email:

Previous Address (If less than 3 years at current address):

Postcode:

Country:

Position:

Signature:

B. Details of Corporate Trustee's Authorized Signatory

Title (Mr./Mrs./Miss/Other):

Other Initials:

First Name:

Surname:

Address:

Postcode:

Section 5 (Continued)

Country:

Date of Birth:

D	D	/	M	M	/	Y	Y	Y	Y
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Nationality:

Passport Number:

Email:

Previous Address *(If less than 3 years at current address):*

Postcode:

Country:

Position:

Signature:

Section 6

Account Mandate

We SIPP Authorized Signatories hereby apply to open a SIPP Account ('The Account') with State bank of India ('The Bank') in accordance with the published Terms and Conditions and in accordance with the Account Mandate below.

We hereby certify that:

- i. We are dually authorized by the Trust Deed of the Scheme to open the Account and operate it as set out in this Mandate and we hereby indemnify the bank against any losses suffered as a result of any operation of the Account in accordance with this Mandate which is found to be in breach of Trust Deed.
- ii. In the event of death, incapacity or inability to act of the Member, the Bank is able to pay or deliver all money, securities, deeds of documents or any other property, which it holds, to the order of the Corporate Trustee.
- iii. In the event of the inability of the Corporate Trustee to act, the Bank will suspend the operation of the Account until such time as a replacement Corporate Trustee is appointed and becomes a party to the Account. The liability of the Corporate Trustee for any indebtedness arising from time to time on the Account(s) shall be limited to the value of the Assets of the Scheme.
- iv. We agree to notify SBI, regarding any change to the SIPP Scheme including any change of regulatory status.

Authorized Signatories

We request and authorize the bank to act on the signatures of Authorized Signatories, listed in Section B of this application form in respect of all cheques and other orders or instructions.

All the transactions on this account must be signed by

Member and Corporate Trustee

OR

Corporate Trustee only

Number of authorized Signatories required to sign, at any one time, on behalf of the Corporate Trustee

We hereby authorize the Bank to provide the Scheme's Auditors with such information as the auditors may request from time to time until notice in writing to the contrary is received by the Bank.

This mandate shall remain in force until the Bank receives written notice of its revocation, notwithstanding any change in the constitution or name of the Scheme and shall apply, notwithstanding any change in the identity of the Trustees or the admission of any new Trustee or Trustees.

The Bank is requested and authorized to

- a) open additional accounts as and when required,
- b) accept instructions from time to time regarding any changes to the authorized signatories,
- c) accept instructions given by facsimile.

Section 7

We declare that the (SIPP Name) SIPP is an approved scheme by HMRC.

The State Bank of India (UK) Ltd may share your personal data with, and obtain personal data about you from, credit reference agencies or fraud prevention agencies for use in verifying your identity, credit decisions and for fraud and money laundering prevention. If fraud is detected, you could be refused certain services, finance, or employment. Further details explaining how the personal data held by fraud prevention agencies may be used can be found on our website: www.sbiuk.com/credit-reference

The State Bank of India (UK) Ltd will not disclose any personal data to any company outside the State Bank Group except to help prevent fraud, or if required to do so by law. For further information on how your personal data is used, how we maintain the security of your personal data and your rights to access personal data we hold on you, please see our Privacy Policy, a copy of which can be found here: www.sbiuk.com/footer/bottomfooter/privacy-policy or contact us at customerservices.sbiuk@statebank.com marking the correspondence for the attention of the Data Protection Officer.

The State Bank of India (UK) Ltd would like to send you information about special offers you may be entitled to or about products and services available from the State Bank Group that may be of interest to you. If you agree to being contacted in this way please tick the relevant boxes:

I/We understand that the information I/We have given to the Bank (Described in the section of the Bank's Term and Conditions relation to Data Protection) will be used for the purpose set out in the section.

Post

Email

Phone

SMS

Section 7 (Continued)

I/We have read and understood that these documents are part of our contract with the bank. If there is anything in the bank's Terms and Conditions that I/We do not understand and wish to discuss, I/We will contact our local branch before signing the form.

Member and Corporate Trustee

OR

Corporate Trustee only

Authorized Signatories

1. Full Name:

Signature:

Date:

2. Full Name:

Signature:

Date:

Please provide full details of the certifier (Mandatory)

Full Name	
Title or position Profession	
Professional body and qualifications (where applicable)	
Office address	
Telephone	
Email address	
Website	
Fax	