

# Member Contribution Form Guidance

Quick actions:

Document reference H102G

## 1. Member details

If you are completing this form as a supplement to a new application, leave this section blank.

<b>Forename(s)</b>	Your first name and any middle names.
<b>Surname</b>	Your last name.
<b>Date of birth</b>	Your date of birth in the format DD/MM/YY.
<b>National Insurance number</b>	Your National Insurance number. If you do not have a National Insurance number you should indicate this. If you have forgotten your National Insurance number you must contact HM Revenue & Customs (HMRC) to find out what it is.
<b>Hornbuckle plan number</b>	Your Hornbuckle plan number.
<b>Email</b>	Your preferred contact email address. We will use your email address to send you information relating to the administration of your plan, so you should avoid using a work email address or another address likely to be accessed by someone else.
<b>Address</b>	Your permanent residential address.
<b>Postcode</b>	Your postcode if you live in the UK, or otherwise your ZIP code, etc.
<b>Do you have Enhanced or Fixed Protection?</b>	<p>If you have successfully applied to HMRC for one of the forms of protection against a reduction in the Lifetime Allowance you will have received a certificate confirming that fact from HMRC.</p> <p>If you currently hold Enhanced Protection or one of the forms of Fixed Protection, and you or anyone else pays any pension contributions to one of your pension plans, you may lose your protection.</p> <p>This can mean that you (or, on your death, your personal representatives) will be liable to a tax charge, called the lifetime allowance charge. If you lose your protection and do not inform HMRC within a given timeframe, you may also be liable to a further tax penalty.</p>
<b>Money Purchase Annual Allowance (MPAA)</b>	The Money Purchase Annual Allowance (MPAA) applies to individuals who have flexibly accessed their pension benefits, either through Flexi-access Drawdown (FAD) or Uncrystallised Funds Pension Lump Sum (UFPLS). From the 6th April 2017 the annual allowance for pension contributions is £4,000.

## 2. Employment status

From the first list of options (employed, self-employed, pensioner, child under 16) you should select the option that describes your current employment status (if you feel that more than one option applies, you should select the one that provides your principal source of income).

If none of the options describes your employment status, you should select "other", and then choose the option from the second list that best describes your status.

If you feel that none of those options describes your status, you should provide a brief description in the space provided.

### 3. Contribution details

<b>Net amount of single contribution</b>	<p>The amount of any single, “one-off” contribution you intend to pay to your plan.</p> <p>You should enter the net amount of your contribution before any tax relief has been applied. For example, if you intend to pay £8,000 into your plan, and we will claim basic rate tax relief of £2,000, you should enter £8,000.</p>
<b>Net amount of regular contributions (per payment)</b>	<p>The amount of any regular (i.e. annual or more frequent) contributions you intend to pay to your plan.</p> <p>You should enter the amount you intend to contribute per payment, rather than per annum. For example, if you intend to contribute £24,000 per annum in monthly instalments of £2,000, you should enter £2,000.</p> <p>You should enter the net amount of your contributions before any tax relief has been applied. For example, if you intend to pay £2,000 each month, and we will reclaim basic rate tax relief of £500 per month, you should enter £2,000.</p>
<b>Start date of regular contributions</b>	<p>The date on which you intend to start paying regular contributions to your plan.</p>
<b>Frequency of regular contributions</b>	<p>The frequency of regular contributions you intend to start paying to your plan.</p>

### 4. Bank account details

Please fill in your bank account details.

### 5. Source of funds

Select the source of funds you will use in order to pay contributions to your plan. Select all that apply.

If you select “other”, please provide a short description of the source of the funds you will use (e.g. inheritance, property sale, etc.).

## 6. Member declarations

If you are completing this form as a supplement to a new application, leave this section blank.

This section contains a number of declarations relating to the payment of your contributions, all of which are required in order for us to apply to HMRC for tax relief.

If the form is being completed by someone else on the member's behalf (for example, because the member is a minor, or they are physically or mentally incapacitated), then the person completing the form on their behalf should sign the form.

The following persons should sign the form in the circumstances outlined:

<b>If the member is a child under the age of 16</b>	The member's parent or guardian, or a person with parental responsibility for the member.
<b>If the member is incapable, by reason of mental disorder, of managing their property and affairs</b>	The member's attorney or receiver, or another person managing and administering the member's affairs.
<b>If the member is suffering from a physical disability, by reason of which they have difficulty executing documents in respect of the management and administration of their property and affairs</b>	A person having a power of attorney in relation to the affairs of the member.

Except where the form is being completed by the member's parent or guardian, you should include written details of the capacity in which you are representing the member. We will also require a copy of any relevant power of attorney.

### Get in touch

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