

The Fidelity SIPP

Switch form for making changes to the funds you are investing in. Alternatively you can make a switch by calling us on 0800 358 7480

Use this form to:

- change the funds you are investing in
- move from fund(s) to fund(s)
- move from fund(s) to cash within your account
- move from cash within your account to fund(s).

Don't use this form if:

- you want to make any other changes to your Fidelity SIPP.

Before you fill in this form:

- make sure you read the important documents shown in the box to the right.


How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this:
- if you make a mistake, please correct it but don't use correction fluid.

Checklist

- Check that you have answered all the relevant questions
- Check the funds you are switching into total 100%
- Read and sign the Declaration in section 3.

What's next?

 Send your completed form to:

Fidelity
PO Box 391
Tadworth
KT20 9FU

We will carry out your switch instructions and send you a confirmation within a few days. You will receive one confirmation for the sale of your funds and another for the purchase of new funds.



Further information on [fidelity.co.uk](https://www.fidelity.co.uk)

You should read these documents before completing this form. You will find them at [fidelity.co.uk/sippinfo](https://www.fidelity.co.uk/sippinfo)

- Key Features Document – this summarises everything you need to know about the Fidelity SIPP
- When choosing your funds make sure you read the key information document which sets out key information about the fund including the objectives and risks, what it invests in and its charges.

Want to talk to us?

Freephone **0800 358 7480**

1 About you

1.1 Your details

1.1.1 Title

Mr Mrs Ms Other:

1.1.2 Surname

1.1.3 First and other names in full

1.1.4 Date of birth (DDMMYYYY)

Town of birth

1.1.5 Country of birth

1.1.6 Employment status

- Employed Self-employed Unemployed Full-time education
 Pensioner Caring for children under 16 Other - please specify below.

1.1.7 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

No Yes -

1.1.8 Are you a UK National only? (Please mark an X in the box)

1.1.9 Are you a UK National and National of one or more other countries? (Please mark an X in the box and list all other countries below)

1.1.10 Are you a National of Non-UK countries only? (Please mark an X in the box and list all other countries below)

Nationality 1

Nationality 2

Nationality 3

Nationality 4

1.1.11 Driving Licence number (if applicable - 18 characters as shown on your photocard)

1.1.12 Phone numbers

Home

Mobile

2 Your investment choices

2.1 Switch instructions

This form is for switching funds and cash only. Should you wish to change your exchange traded investments please use our online service at fidelity.co.uk. To perform a switch please use the 'Switch from' section to let us know which of your funds you wish to sell and the percentage of each to be sold. For example, to switch entirely out of a fund please enter 100% for that fund. If you specify 40%, then we will sell 40% of your current holding. You must then use the 'Switch to' section to let us know how to invest the proceeds. For example to invest half of the proceeds into a specific fund, enter the fund details and 50%. You may specify some or all of the cash within your account to be included in the switch. Fund manager buy and sell charges may apply.

We will follow your investment instructions below, but where we cannot achieve this we will hold your money as cash within your account.

Need help choosing funds? We've developed a range of easy options to help you choose funds to put in the Fidelity SIPP. Take a look at the guidance section of our website at fidelity.co.uk

Please ensure you include the fund code as the fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at fidelity.co.uk

Should any of your new funds pay income, we will follow your existing preferences for income payments on your account.

Switch from:

Fund code	Fund name	Percentage of existing holding to be switched
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash within my account		<input type="text"/> %

Switch to:

Fund code	Fund name	Percentage of holding to be bought
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash within my account		<input type="text"/> %
Totals should add up to 100%		<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %

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3 Your application summary

3.1 Declarations

I understand that the information I provide on this form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity SIPP Terms & Conditions.

I declare that:

- I have been provided with and read:
 - the latest version of the Key Features Document
 - Doing Business with Fidelity incorporating the Fidelity Client Terms
 - the key information documents relevant to the chosen fund(s).
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.
- I confirm that I have not received advice from Fidelity in connection with this switch.

Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

Signature



Date signed

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