



## Philip J Milton & Company Plc Managed Self-Invested Personal Pension

### Pension Contribution Form

Full Name

Pension Acc. No.

Personal contributions are paid net of basic rate income tax which we claim back from HMRC and add to your plan. Any employer's contributions must be paid gross.

Details of contributions:

Your net single contribution

£

Your employer's single gross contributions

£

Any cheques should be made payable to : PJMilton Pension Account

Your net monthly contribution

£

Your employer's gross monthly contribution

£

Monthly contributions will be taken on the 15<sup>th</sup> of each month

Signature

Date (dd/mm/yy)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>
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If your employer is paying contributions or deducting contributions from your salary and passing them on to us, your employer will need to complete the employer section below.

Employer Name

Employer's address

<input type="text"/>
<input type="text"/>
<input type="text"/>
Postcode

Contact Name	<input type="text"/>
Telephone Number	<input type="text"/>
Email address	<input type="text"/>

*Continued overleaf*

### **Employer's Declaration**

(To be read, signed and dated by the Employer)

- We agree that we are willing to pay Quai Investment Services Limited the amount(s) indicated above.
- Where an employee contribution is paid by the employer we confirm the net payments will be deducted from the employee's net pay. Employer contributions will be paid gross.
- We understand that for the company to be able to claim Corporation Tax relief on an employer contribution it must rank as a valid business expense.
- Regular employee and employer contributions will be collected from the employer's bank account on the 15<sup>th</sup> of the month, or if this is not a working day, the next working day.
- We understand that if an employee contribution is not received by Quai Investment Services Limited by the 22<sup>nd</sup> of the month following the calendar month the payment is deducted from pay then this will be classed as a late payment.
- Quai Investment Services Limited are required to report the late payment of a contribution, where it is likely to be of material significance, to The Pension Regulator.
- We understand that it is the responsibility of Quai Investment Services Limited to monitor payment of contributions and that we must provide any information requested to fulfil this requirement. Failure to provide information that prevents Quai Investment Services Limited from monitoring the payment of contributions must be reported to The Pension Regulator.
- We understand that employer contributions paid to the Philip J Milton & Company Plc Managed SIPP cannot be refunded unless the Pension member cancels their Pension within the cancellation period.
- We agree to pay the contributions stated in this application, until further notice and will notify Quai Investment Services Limited immediately of any changes to the amounts due.



- We agree to advise Quai Investment Services Limited immediately if the member is to leave our employment unless otherwise agreed in writing, we confirm that employer contributions will only be paid in respect of people currently employed and will cease if the member leaves employment.

Signed on behalf of the Employer

Date (dd/mm/yy)   /   /

Name   
Position/Title   
Telephone Number

Please return this form to  
**Philip J Milton & Company Plc, Choweree House, 21 Boutport Street, Barnstaple, Devon EX31 1RP**  
alongside a completed Direct Debit Instruction (where applicable). Thank you.

Philip J Milton & Company Plc is authorised and regulated by the Financial Conduct Authority, registered in England No 3233275, VAT No 682254428.  
Quai Investment Services Limited is authorised and regulated by the Financial Conduct Authority, - Firm Reference Number 922590, and Registered in England No 9919243. The Registered Office for Quai Investment Services Limited is Unit 16 Tesla Court, Innovation Way, Peterborough, PE2 6FL.