

This form should be used for making SIPP investments through Chelsea, using the Cofunds platform.  
Please complete this form using black ink in BLOCK CAPITALS.

## Client Details – Please complete this section in full

Existing Cofunds Client Reference (if applicable)	<input type="text"/>	Current Permanent Residential Address	<input type="text"/>
Mr/Mrs/Ms/Miss/Other	<input type="text"/>		<input type="text"/>
Surname	<input type="text"/>		<input type="text"/>
Full First Name(s)	<input type="text"/>		<input type="text"/>
Daytime Telephone	<input type="text"/>	Postcode	<input type="text"/>
Email Address	<input type="text"/>	Time at this address	<input type="text"/> years <input type="text"/> months
Male <input type="checkbox"/> Female <input type="checkbox"/>			

## Investment Instruction

### Standing Investment Instruction

Use this section to set up a continuous instruction for all contributions, transfers and tax relief into your SIPP (as per your investment selection below). This will remain in force unless otherwise instructed. To change your standing investment instruction, you must complete a new SIPP Investments Application and submit it to Chelsea Financial Services. On receipt of your application at Cofunds, it will take up to five working days to process the request. If any monies are received within this period, Cofunds may invest according to any previous investment strategy.

### Investment Selection

I wish to invest 100% of my contribution into one of the following Chelsea Easy Retirement Portfolios (minimum initial contribution £10,000). Please tick one of the Portfolios below.

- |   |   |
|---|---|
| Either <input type="checkbox"/> Cautious Growth Easy Retirement Portfolio | or <input type="checkbox"/> Aggressive Growth Easy Retirement Portfolio |
| or <input type="checkbox"/> Balanced Growth Easy Retirement Portfolio     | or <input type="checkbox"/> High Alpha Easy Retirement Portfolio        |

Or select your own funds and complete the section below.

I wish to invest in the funds indicated.

Minimum investment £1,000 per fund (Lump Sum). Minimum regular investment of £50 per fund. If investing in an OEIC fund, your investment will be made in the Retail Share Class. For details of the funds available, please speak to Chelsea Financial Services.

Fund Manager and Fund Name	Percentage	Monthly Regular Investment (min £50 per fund)
<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"/> £
<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"/> £
<b>TOTAL</b>	<b>100%</b>	<b>£</b>

## Declaration and Authorisation

### I confirm that:

I understand that the investment account with Cofunds will be set up in my name, as a holder of a SIPP. I understand that either I, or my Nominated Intermediary, will have authority to give instructions direct to Cofunds for the purchase, sale or switching of investments within the investment account. I have read and understood the Platform Key Features document and agree to be bound by the terms within.  
I understand that instructions may be delayed or rejected if this application form is not complete in all respects.  
The investment instructions on this form supersede all previous investment instructions in respect of the SIPP to which they apply.  
I am aged 18 or over.

**Data Protection:** Cofunds Limited will use your information for the administration and servicing of your investments and all other related activities. They may disclose your information to their agents and service providers for these purposes. They may also disclose your information to organisations for compliance with legal and regulatory requirements.  
With the exception of the above provisions, they will not pass on your details to any other third party without your permission, but they will disclose information concerning your investment to your Nominated Intermediary.

Signature	Date
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