

Can we help you?

If you or your financial adviser needs help completing the form, please contact us, telephone calls may be recorded.

T: 0800 208 4483

E: admin@uk.causeway-securities.com

Please send completed applications including the required supporting documentation to:

E: admin@uk.causeway-securities.com

Causeway Securities Limited
PO Box 1378, St Albans, AL1 9SX

Please note that we cannot accept your application unless you have either received financial advice or had the appropriateness of this investment assessed by an FCA regulated financial adviser.

EU UK DEFENSIVE STEPDOWN KICK-OUT PLAN CA-18

AUGUST 2026

APPLICATION FORM SIPP/SSAS PENSION TRUSTEES

Key Dates

ISA Transfer Deadline: 17 July 2026

Application Deadline: 31 July 2026

Start Date: 7 August 2026

ISIN: XS3317212713

APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

4. TRUSTEE DETAILS (...continued)

Third Trustee

Full Name:

Residential

Address:

COUNTY

POST CODE

Tax Residency:

Date of Birth: DD MM YYYY

Telephone No:

Fourth Trustee

Full Name:

Residential

Address:

COUNTY

POST CODE

Tax Residency:

Date of Birth: DD MM YYYY

Telephone No:

5. PAYMENT DETAILS

All redemptions will be transmitted to the following bank/building society account. Payments can only be made into an account with a bank or building society within the UK Clearing system.

Bank / Building Society Name:

Account Holder Name:

Sort Code: Account Number:

Building Society Reference or Roll Number

6. SOURCE OF FUNDS - What has created / is generating the funds being used to open this plan?

- Accumulated Savings
 Pension Lump Sum
 Employment related (e.g. Bonus)
 Property Sale
 Inheritance
 Reinvestment of matured funds
 Transfer from another provider

Other (please state):

7. INVESTMENT DETAILS (Minimum £3,000.00)

Product Name	Amount (£)*	Adviser Fee (£ or %)	Adviser Fee has been settled Directly with Customer (circle)
			YES NO

***Investment amount must be in whole pounds.**

Please submit the above investment amount by bank transfer to the details below:

Bank Name:	Natwest
Account Name:	Causeway Securities Limited
Sort Code:	60-00-01
Account Number:	49228609
IBAN:	GB89NWBK60000149228609
Payment Reference (MANDATORY):	Please use your pension scheme name

APPLICATION FOR SIPP/SSAS PENSION TRUSTEES



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- u _____
- u _____ @ _____ V _____ yM
- 7 _____ o _____ Joint Money Laundering Steering Group (JMLSG)
- @ _____

† _____ @ _____ # _____ @ _____ # _____ o _____

Tick to confirm declaration above

Authorised Signatory		Date: ____ / ____ / ____
Full Name:		
Job Title:		

Please return the completed and signed Form to: Causeway Securities Limited, PO Box 1378, St Albans, AL1 9SX

If you have difficulty in reading our literature, please call us on 0800 208 4483. We can supply this in a range of formats including large print, audio & Braille.

**PLEASE SEND COMPLETED APPLICATIONS INCLUDING THE
REQUIRED SUPPORTING DOCUMENTATION TO:**

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