

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.

THREE STOCK STEP DOWN KICK-OUT PLAN (BNP-16)

JUNE 2026

APPLICATION FORM **SIPP/SSAS PENSION TRUSTEES**

Key Dates

ISA Transfer Deadline: 15 May 2026

Application Deadline: 29 May 2026

Start Date: 5 June 2026

ISIN: XS3334591594

APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

4. TRUSTEE DETAILS (...continued)

Third Trustee

Full Name:

Residential Address:

COUNTY:

POST CODE:

Tax Residency:

Date of Birth:

Telephone No:

Fourth Trustee

Full Name:

Residential Address:

COUNTY:

POST CODE:

Tax Residency:

Date of Birth:

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

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