

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.

UK EU 65/65 STEP DOWN KICK-OUT PLAN CIT-04

SEPTEMBER 2026

APPLICATION FORM **SIPP/SSAS PENSION TRUSTEES**

Key Dates

ISA Transfer Deadline: 21 August 2026

Application Deadline: 04 September 2026

Start Date: 11 September 2026

ISIN: XS3346655262

APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

1. SCHEME AND TRUSTEE(S) DETAILS

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2. BENEFICIARY DETAILS (Please copy sheet for additional beneficiaries)

First Beneficiary

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Second Beneficiary

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Are you resident for tax purposes in any other country?:	0505	bუ

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3. TRUSTEE DETAILS

First Trustee

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Second Trustee

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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

8. DATA PROTECTION – Use of your data

[illegible][illegible][illegible]

9. DECLARATION

[illegible]

- [illegible]

Notes:

[illegible][illegible]

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Authorised Signatory		Date: ____ / ____ / ____
Full Name:		
Capacity		

Authorised Signatory		Date: ____ / ____ / ____
Full Name:		
Capacity		

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APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

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☐ 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.

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