

Old Mutual Wealth SIPP preference form

Important: action required for your SIPP

- The current arrangement – under which AJ Bell provides trustee and administration services for the SIPP that was distributed by OMW – will end by 30 September 2018. If you wish to move your OMW SIPP to the AJ Bell Investcentre SIPP, please complete and sign this form.
- If you wish to transfer your OMW SIPP to another provider, please do not complete this form but instead complete the Old Mutual Wealth SIPP transfer discharge form.
- If you have any immediate questions, please contact your financial adviser in the first instance.

Section A: Your details

Your full name

SIPP account number

Section B:

- I hereby confirm my preference in relation to the future administration of my pension and investments, which are currently held in the Old Mutual Wealth SIPP product.
- I wish to keep my SIPP trustee and administration services with AJ Bell, and transfer my investments to the AJ Bell Investcentre SIPP.
- This document is my acceptance of the terms and conditions and also the charges and rates of the AJ Bell Investcentre SIPP.
- I also agree that any adviser charges currently payable under the Old Mutual Wealth SIPP will continue under the AJ Bell Investcentre SIPP until such time as I request for them to cease.

Signed by the member in his/her capacity as member of the arrangement, or if a child SIPP signed by the legal guardian in his/her capacity as legal guardian of the member of the arrangement:

Signature Date

Full name

Please return the completed form to:

Old Mutual Wealth SIPP Administration Team (SIPP Closure)
AJ Bell Management Limited
4 Exchange Quay
Salford Quays
M5 3EE

The Old Mutual Wealth SIPP is administered by AJ Bell Management Limited, part of AJ Bell.
Telephone: 0345 373 3470. Fax: 0345 543 2601 Email: oldmutualwealthsipp@ajbell.co.uk

AJ Bell Management Limited is registered in England and Wales at 4 Exchange Quay, Salford Quays, Manchester M5 3EE.
Registered number 3948391.

Sippdeal Trustees Limited is the Trustee of the Old Mutual Wealth SIPP.
Sippdeal Trustees Limited is a wholly owned subsidiary of AJ Bell Management Limited.

The Old Mutual Wealth SIPP is distributed by Old Mutual Wealth Life Assurance Limited. Registered number: 1363932
England. Registered Office: Old Mutual House, Portland Terrace, Southampton SO14 7EJ, United Kingdom.
AJ Bell Management Limited is authorised and regulated by the Financial Conduct Authority.