

# Record of payments due

This form is to be completed by the employer who is making regular contributions to an Aegon Self-invested Personal Pension (Aegon SIPP).

You must notify us of any changes to these payments. If you fail to do so, we'll be unable to monitor payments as detailed in accordance with the Pensions Act 2004, and you may be reported to the Pensions Regulator.

If you're deducting employee's contributions from their net salary, these must be received by us no later than 22 days after the end of the month in which the deduction was made.

Please ensure that the completed form is signed and returned to Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB.

**Please complete this form in BLOCK CAPITALS and ballpoint pen.**

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## 1. Member details

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Title

Mr / Mrs / Miss / Ms / Other – please specify

Surname

Full forename(s)

Date of birth

D	D	M	M	Y	Y	Y	Y
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National Insurance (NI) number

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## 2. Employer details

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Employer name

Company registration number

Person dealing with correspondence

Contact telephone number (for any questions)

Address

Postcode

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### 3. Regular contributions details

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#### Monthly contributions

Employer  
(gross)

Salary Sacrifice  
(gross)

Employee  
contribution (net)

from employee's  
gross income

from employee's  
net income, we add  
basic rate tax to this

Do you want to increase regular contributions each year?

No

Yes, by the Retail Price Index (RPI)

Month in which the first employee contribution is deducted from pay (if applicable)

Start date\* (dd/mm/yyyy)

\*We'll normally take the first payment from your account up to 17 days after receiving this form. Depending on the date you select, this may mean we take your first payment the following calendar month.

## 4. Declaration

In this declaration, 'we' means the employer and Aegon means Scottish Equitable plc as the provider of the Aegon SIPP.

- 4.1** We declare that to the best of our knowledge and belief, the statements made in this section and any related documents are correct and complete and that we haven't concealed any material fact.
- 4.2** We agree to pay Aegon regular contributions for the member.
- 4.3** Although we can contribute to member's benefits, the contracts exist between the member and Aegon.
- 4.4** We'll be responsible for dealing and corresponding with Aegon regarding the payment or non-payment of contributions for the member.
- 4.5** We undertake to advise Aegon within 30 days of the member ceasing to be employed by us or where contributions are reduced or terminated.
- 4.6** If any payment due isn't received by Aegon within 90 days of the due date or where Aegon feel that non-payment is of significance, Aegon must advise The Pensions Regulator and if Aegon hasn't reported to them previously, the member.

- 4.7** It's our responsibility to ensure Aegon is provided with relevant information to monitor payments and that should we fail to provide it we'll be reported to the Pensions Regulator.
- 4.8** We confirm that, under relevant Data Protection Legislation, we have a suitable lawful basis for sharing the member's personal data within the schedules to be provided to Aegon from time to time and used in accordance with the Data Protection section in the terms and conditions.
- 4.9** We are aware that you make our personal information available to third parties by electronic or other means for the purpose of verifying identity in accordance with the Money Laundering Regulations.

Date

D	D	M	M	2	0	Y	Y
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Print name

Employers signature

X	X
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