



HERITAGE PENSIONS

BORROWING INFORMATION

SIPP reference number _____

PLEASE RETURN THIS FORM TO:

Heritage Pensions Limited
6 Doolittle Mill
Froghall Road
Amphill
Bedfordshire
MK45 2ND

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1 Member Details

Title Mr Mrs Miss Ms Other

Name

Permanent residential address

 Postcode

Telephone numbers Home Work
 Mobile Fax

If there is more than one SIPP borrowing, please provide details on a separate sheet

2 Lender Details

Name of firm

Address

 Postcode

Contact name

Email address

Telephone numbers Office Mobile

Is the lender connected to you? Yes No

If 'Yes', please explain how connected



3 Documentation

Please confirm which documents have already been prepared and provide copies when returning this form

Facility/offer letter

Legal charge

Other (please specify)

4 Reason for Borrowing

To assist property purchase

Other (please specify)

5 Borrowing Repayment Terms

Amount to be borrowed



Please confirm terms of borrowing

Regular contribution Monthly Quarterly
 Annually Other

Repayment amount £ Term
 Interest rate % or Base rate plus %

Are all arrangement fees included in the amount to be borrowed? Yes No

How will the repayments be funded?

6 Member's Declaration

As a Member of the Heritage SIPP I confirm that:

- I have taken advice on the suitability of the borrowing
- The above information is to the best of my knowledge, true and complete and no material details have been omitted
- I authorise the use of this information to be disclosed to relevant parties
- I authorise Heritage Pensions Limited to give and request information necessary to complete this transaction and comply with HMRC requirements

Signature

Name

Dated

