

### 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](mailto:admin@uk.causeway-securities.com)

Please send completed applications including the required supporting documentation to:

E: [admin@uk.causeway-securities.com](mailto: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 STEP DOWN KICK-OUT PLAN - CA-16

## JUNE 2026

## APPLICATION FORM SIPP/SSAS PENSION TRUSTEES

### Key Dates

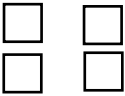
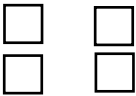
ISA Transfer Deadline: 5 June 2026

Application Deadline: 19 June 2026

Start Date: 26 June 2026

ISIN: XS1996637473

1. SCHEME AND TRUSTEE(S) DETAILS







**10. YOUR SIGNATURE** (Please copy sheet for additional Signatories)

<b>Authorised Signatory</b>		<b>Date:</b> ____ / ____ / ____
<b>Full Name:</b>		
<b>Capacity</b>		

<b>Authorised Signatory</b>		<b>Date:</b> ____ / ____ / ____
<b>Full Name:</b>		
<b>Capacity</b>		

**PLEASE PROVIDE AN UP TO DATE LIST OF AUTHORISED SIGNATORIES (INCLUDING SAMPLE SIGNATURES) WHEN YOU SUBMIT THIS APPLICATION**

**11. ADVISER SECTION**

# APPLICATION FOR SIPP/SSAS PENSION TRUSTEES



Tick to confirm declaration above

<b>Authorised Signatory</b>		<b>Date:</b> ____ / ____ / ____
<b>Full Name:</b>		
<b>Job Title:</b>		

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REQUIRED SUPPORTING DOCUMENTATION TO:**

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