

### 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 6-YEAR FIXED MONTHLY INCOME PLAN (60% BARRIER) GS-21

## JULY 2026

## APPLICATION FORM **SIPP/SSAS PENSION TRUSTEES**

### Key Dates

ISA Transfer Deadline: 10 July 2026

Application Deadline: 24 July 2026

Start Date: 31 July 2026

ISIN: XS3320858759



## 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



# APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

## 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

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V ...

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h ... 7 ... o ... k ...

Please tick ONE of the following to confirm.

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- @ ... @
- @ ... h ... M @ ... )
- @ ... # ... o ... u ... 7# ... =
- @ ... @ ... @ ... h ... † ... h
- @ ... @ ... h ... h ... @ ... @
- @ ... # ... o ... @ ... # ... o ... a

u ...

# APPLICATION FOR SIPP/SSAS PENSION TRUSTEES



† \_\_\_\_\_ @ \_\_\_\_\_

@ \_\_\_\_\_

- u \_\_\_\_\_
- u \_\_\_\_\_ @ \_\_\_\_\_ V \_\_\_\_\_ yM
- 7 \_\_\_\_\_ o \_\_\_\_\_ Joint Money Laundering Steering Group (JMLSG)
- @ \_\_\_\_\_

† \_\_\_\_\_ @ \_\_\_\_\_ # \_\_\_\_\_ @ \_\_\_\_\_ # \_\_\_\_\_ o \_\_\_\_\_

Tick to confirm declaration above

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

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.

**PLEASE SEND COMPLETED APPLICATIONS INCLUDING THE  
REQUIRED SUPPORTING DOCUMENTATION TO:**

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