Please read this document carefully so you fully understand the implications of any financial decisions and keep it safe for future reference. It may also help to refer to our online **glossary** for explanations of technical or unfamiliar terms.

embark pensions

# OPTION SIPP AND FULL SIPP
## PRODUCT CONVERSION FORM

We want all of our customers to be able to access our services equally. For those who may need additional help, we have put in place some support to make it easier. If required, we can arrange to send you this document in special formats, such as large print or braille. Please ring us on **0344 544 0566** if this is needed.

Full details of how we can tailor communications and documents to suit your needs can be found on our website at **www.embarkpensions.co.uk/accessibility-policy**

**Please use this form should you wish to change your product from the Option SIPP to the Full SIPP, or vice versa.**

**Please complete this form in BLOCK CAPITALS and BLACK INK and email it to newbusiness@embarkpensions.co.uk. We strongly recommend that you encrypt your email to protect the contents and your personal information. If you are using a password to protect your request, please remember to contact us separately with the password used. Alternatively, please post to: Embark Pensions, Provincial House, 37 New Walk, Leicester, LE1 6TU**

**If at any time you need assistance in completing this form, please call our Customer Services team on 0344 544 0566.**

The Option SIPP allows you to invest into standard investments via investment managers, platforms and stockbrokers. In addition the Full SIPP allows you to invest in commercial property.

If you are converting your Option SIPP to a Full SIPP, we require that you obtain independent advice.

If you are converting your Full SIPP to an Option SIPP, we strongly recommend that you obtain independent advice.

Please include any additional forms necessary for any new investments to be made after the product conversion.

## 1 MEMBER DETAILS

Title:

Forename(s):

Surname:

Date of Birth: D D M M Y Y Y Y

National Insurance Number:

## 2 CONVERSION DETAILS

Pension Scheme Reference:

Please select **one** statement only:

I currently have the Option SIPP and wish to convert to the Full SIPP ☐

I currently have the Full SIPP and wish to convert to the Option SIPP ☐

Please ensure you first review these key documents for your new SIPP:

- **Key Features Document**
- **Terms & Conditions**
- **Fee Schedule**

These forms are all available on the literature pages of our website, **embarkpensions.co.uk/literature.**

## 3 INVESTMENTS

This section is only required for conversions from the Option SIPP to the Full SIPP.

Please confirm which investments you wish to access under the Full SIPP (please select all that apply):

Property ☐ Please read our **Commercial Property Guide** and complete our **Property Questionnaire.**

These forms are all available on the literature pages of our website, **embarkpensions.co.uk/literature**.

## 4 MEMBER DECLARATION

I confirm I have read and understood the Key Features, Terms and Conditions and Fee Schedule for my new SIPP, and request that you process my conversion.

I acknowledge that the annual fees for my new SIPP will be adjusted at the next anniversary of my SIPP and will be pro-rated.

Signature:

Print Name:

Date: D D M M Y Y

## 5 ADVISER DECLARATION

This section is mandatory for conversions from the Option SIPP to the Full SIPP.

By signing below, I confirm that I have provided advice to the member to proceed with the product conversion and provided the member with the Key Features, Terms and Conditions and Fee Schedule for their new SIPP.

Financial adviser firm name:

Adviser contact name:

Signature:

Date: D D M M Y Y

embark pensions

0344 544 0566

customerservices@embarkpensions.co.uk

Provincial House, 37 New Walk, Leicester, LE1 6TU

embarkpensions.co.uk

EBS Pensions Limited act as operator for the Option SIPP, Full SIPP, Liberty SIPP, EBS SIPP and EBS SAPPP. Embark Services Limited act as operator for the Hornbuckle Mitchell SIPP, Hornbuckle Mitchell Private Pension, Hornbuckle Mitchell FIPP, The Private Pension and the Freedom SIPP.

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