

OPTION SIPP AND FULL SIPP

CHANGE OF ADVISER FORM

Please complete this form in BLOCK CAPITALS and black ink and return it to: Embark Pensions, Dunscar House, Deakins Business Park, Egerton, Bolton BL7 9RP. If you need assistance in completing this form, please call our Customer Services team on 01204 803500.

Please complete this form if you would like to change your financial adviser.

1 CLIENT DETAILS

Client Name:

Client Address:

Postcode:

Client Date of Birth:

| D | D | M | M | Y | Y | Y | Y |

Client Ref Number:

2 CURRENT ADVISER DETAILS

Current Adviser Name:

Current Company Name:

3 NEW ADVISER DETAILS

New Adviser Name:

New Adviser Company:

New Adviser FCA Number:

Annual adviser charge: % **OR** £

Is this charge subject to VAT?

Frequency: Monthly

Quarterly

Annually

Initial adviser charge: % **OR** £

Is this charge subject to VAT?

Frequency: Monthly

Quarterly

Annually

If your new adviser does not have an agency agreement with EBS Pensions Limited, trading as Embark Pensions they must complete an agent registration form.

4 CLIENT / ADVISER SIGNATURE

Client signature

Signature: 

Print Name:

Date: | D | D | M | M | Y | Y |

Adviser signature


Signature: 

Print Name:


Date: | D | D | M | M | Y | Y |



 01204 803500

 Dunscar House, Deakins Business Park,
Egerton, Bolton BL7 9RP

 customerservices@embarkpensions.co.uk

 embarkpensions.co.uk