



New Member Form

SIPP

Please complete all sections in black ink, in BLOCK LETTERS.

If you have any questions, please do not hesitate to contact us, quoting EBS Pensions Limited (EBS) on all communications.

Please return completed from to:

EBS Pensions Limited

5th Floor

100 Cannon Street

London

EC4N 6EU

New Member Form

Personal Details

Title	<input type="text"/>		
First Names	<input type="text"/>		
Surnames	<input type="text"/>		
Home Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Telephone Number	<input type="text"/>	Office Number	<input type="text"/>
Mobile Number	<input type="text"/>	Fax Number	<input type="text"/>
Email Address	<input type="text"/>		
Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>
National Insurance Number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employment status	<input type="checkbox"/> Employed	<input type="checkbox"/> Self-employed	<input type="checkbox"/> Other

Fees

EBS will charge an annual trustee fee of £550 plus VAT which may be subject to change in the future. This fee is payable annually in advance. The second and subsequent fees are payable by standing order, effective one year after your SIPP is established. For full details of our fees, please refer to the 'EBS SIPP Fee Schedule' sheet.

Name of your SIPP

Your SIPP may have any name as long as it does not duplicate that of another member's EBS SIPP.

The SIPP

Declaration

I have received and read copies of your Key Features document, Terms of Business, EBS SIPP Fee Schedule and Glossary in respect of the EBS SIPP (the 'Scheme'). I have had an opportunity to raise any issues which I do not understand with you.

By signing this new member form I

1. agree to the basis on which the Scheme is governed as set out in these documents
2. agree to the charges which will apply
3. agree that your charges shall be paid out of my SIPP fund
4. ask you to send me all other necessary documentation to sign to apply to establish my SIPP fund within the Scheme

Signed

Print Name

Date

D		D	M		M	Y		Y		Y		Y
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Privacy notice

EBS Pensions Limited will collect personal information about you such as your name and address ("Personal Data"). EBS Pensions Limited will be the Data Controller as defined under UK Data Protection legislation and regulations.

We will only process your personal data where we have a legal basis for doing so. This includes:

- Where you have provided positive consent to the company
- Processing is necessary for the performance of a contract between you and the firm or to take steps to enter into a contract;
- Processing is necessary for compliance with a legal or regulatory obligation
- The company has a legitimate interest upon which the data may be processed. Any decision to process data on the basis of legitimate interest will be made on a case by case basis and in line with the guidance set out in UK Data Protection legislation.

We may disclose your Personal Data to other companies within the Embark Group of companies and third parties which provide services in connection with the administration of your account.

We may also share your Personal Information for legitimate business reasons or as may be required by applicable law and regulations with your Financial Adviser, third parties appointed by your Financial Adviser, third party investment managers, and product providers with whom you or your Financial Adviser instructs us to invest.

We may disclose your Personal Information to a credit reference agency in order to verify your details both during the application process and the ongoing administration of your account. This information will be used to prevent fraud and money laundering and to check your identity. Any checks performed may be recorded on your credit history.

We will disclose your Personal Information to any governmental, legal or regulatory body if required to do so by applicable law and regulation.

We may need to disclose sensitive Personal Data about you to third parties, such as information relating to your health where required to do so to give effect to an instruction from you or your Financial Adviser in respect of your account

We may need to transfer your Personal Data to another country, in which case we will ensure that your Personal Data is afforded the same level of protection as is required under UK Data Protection legislation and regulations prior to sending your Personal Data.

We will otherwise keep your personal information confidential and never use it for any other purpose or pass your details to any third parties without your consent.

We will retain your Personal Data for no longer than is necessary to provide the services under the Terms and Conditions applicable to the account and to meet any legal or regulatory obligations that may apply.

Privacy notice continued

You have a number of rights under the Data Protection legislation, including:

1. the right to request a copy of the personal information we hold on you. When you request this information, this is known as making a Subject Access Request (SAR). In most cases, this will be free of charge, however in some limited circumstances, for example, repeated requests for further copies, we may apply an administration fee;
2. the right to have personal information we hold about you transferred securely to another service provider in electronic form;
3. the right to have any inaccurate personal information corrected;
4. the right to have any out of date personal information deleted once there's no business need or legal requirement for us to hold it;
5. the right to object or restrict some processing, in limited circumstances and only when we don't have legitimate grounds for processing your personal information;
6. the right to object to your personal information being used to send you marketing material. We will only send you marketing material where you've given us your consent to do so. You can remove your consent at any time

If you have any questions regarding how the firm uses the data it collects please contact:

The Group Data Protection officer, The Embark Group, 100 Cannon Street, London, EC4N 6EU.

If you are not satisfied with any aspect of how we have managed your data you have the right to complain to the Information Commissioners Office. For further details of your rights under the UK's data protection legislation and regulation please contact the Information Commissioner's Office at <https://ico.org.uk/for-the-public/>

By signing the application form, you consent to the use of your Personal Information for the purposes and on the terms set out above. You have the right to withdraw consent at any time.

Notes