

Contributions and new SIPPs before 5th April 2018

We thought it would be helpful to provide you with information regarding our deadlines for receiving contributions and New SIPPs for the tax year end as well as to let you know that we have updated some of our literature.

Contributions

For existing clients wishing to make an ad hoc contribution we can accept completed contribution application forms and funds on the 5th April 2018. If the contribution application form is not fully completed the date of the contribution will be the date we receive all the information required to be able to process the contribution, this means that the contribution may fall into the 2018/19 tax year. We are happy to accept contribution application forms by e-mail, with the original form to follow, in order to check the information on the form and can then confirm if we require any further information.

Please do not arrange for a contribution to be made without the contribution application form having been completed by the client first.

New SIPPs

Due to the high volume of SIPPs received at the end of the tax year we would ask that all new SIPPs with supporting contributions are received by the 3rd April 2018. If you have an urgent SIPP to be set up after this date please contact your Account Manager.

Permitted Investment List

We have updated our Permitted Investment List to clarify the investments and exchanges which we can and cannot accept into a SIPP. The latest version can be found on our website <http://www.dapco.co.uk/literature/>. Please contact us if you are unsure as to whether an investment meets the permitted investment criteria.

About this document

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