

# Direct Debit Instruction

## Crescent Trustees Limited

For completion by the client or the employer when making regular contributions to the SIPP. All alterations to the Direct Debit mandate form will require confirming with a full signature.

Client name  Plan number / Application ID

If both you and your employer intend to make regular contributions, please use an additional Direct Debit.

**Type of contribution**

**Regular personal contribution**  
Please also complete and return a Contribution form available from our website.

**Regular employer contribution**  
Please also complete and return a Contribution form and an Identity Verification form both available from our website.

Please confirm payment date:

1st of month  8th of month  15th of month  Last day of month

Start date



# Instruction to your Bank or Building Society to pay by Direct Debit

Please fill in the whole form using a ball point pen and send to:  
Curtis Banks, 3 Temple Quay, Bristol, BS1 6DZ

Service Use number

4	4	3	5	2	7
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Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address	
Postcode	

Name(s) of Account Holder(s)

Bank/building society account number

Branch Sort Code

Reference

### Instruction to your bank or building society

Please pay Crescent Trustees Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Crescent Trustees Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s):
Date

This Guarantee should be detached and retained by the Payer



## The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Crescent Trustees Limited will notify you 10 business days in advance of your account being debited or as otherwise agreed. If you request Crescent Trustees Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Crescent Trustees Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Crescent Trustees Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Curtis Banks Limited,  
3 Temple Quay,  
Bristol, BS1 6DZ

T 0370 414 7000  
F 0117 929 2514  
curtisbanks.co.uk

**Call charges will vary. We may record and monitor calls.**

Curtis Banks Limited is a company registered in England & Wales (registered number 06758825) and is authorised and regulated by the Financial Conduct Authority (number 492502) with its registered address at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. SL250.202408 August 2024

