

# EU SIPP - Loan Application

To be completed by the member:

## Member Information:

Name  Date of Birth

Member Reference No.  National Insurance No.

## Loan Details:

Name of borrower   
Please note that London & Colonial will only permit loans to corporate bodies

Address of borrower

Telephone number

e-mail address

Bank Name

Account number

Sort Code

Amount of loan £

Intended date of loan

Relationship of the borrower with the member

Proposed term of the loan

Purpose of the loan

How will the loan be repaid?   
e.g. interest only, part capital and interest, capital and interest paid at end of loan term

Interest Rate  %

Will the loan be secured against an asset owned by the borrower or another person? Yes  No

If so what is the proposed security?

continued overleaf...

If applicable, name and address of solicitors who are to prepare the loan documentation

Postcode

Who will meet any legal costs incurred in granting the loan?

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**Declaration:**

- I certify that the information I have provided above is correct and complete to the best of my knowledge. If a tax charge becomes payable because the information I have provided above is proven to be incorrect then I understand that I will be wholly and personally liable for all the tax charges due, including but not limited to any tax charges imposed on the scheme administrator, and any resultant penalty as may be imposed by any regulatory body.
- I understand and agree that: -
  - Lending money to a third party can be a high risk investment decision as there is no guarantee that the loan will be repaid in full. Accordingly any decision to make the loan is my responsibility only and neither the scheme trustee nor the scheme administrator can be held liable in the event of loan default.
  - There could be a delay in the loan being redeemed. This means that the scheme administrator may not be able to crystallise that part of the fund for lump sum or pension purposes until such time that the loan is repaid.
- I request that the scheme administrator lends money to the person identified in this application on the date shown above.
- I agree that London & Colonial's charges in relation to this transaction will be deducted from my fund.

Signed 

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Date 

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Please return this form to London & Colonial, 38-42 Perrymount Road, Haywards Heath, West Sussex, RH16 3DN