

Can we help you?

If you or your financial adviser needs help completing the form, please contact us, telephone calls may be recorded.

T: 0800 208 4483

E: admin@uk.causeway-securities.com

Please send completed applications including the required supporting documentation to:

E: admin@uk.causeway-securities.com

Causeway Securities Limited
PO Box 1378, St Albans, AL1 9SX

Please note that we cannot accept your application unless you have either received financial advice or had the appropriateness of this investment assessed by an FCA regulated financial adviser.

3 YEAR GOLD KICK-OUT PLAN - MS-08

SEPTEMBER 2026

APPLICATION FORM **SIPP/SSAS PENSION TRUSTEES**

Key Dates

ISA Transfer Deadline: 14 August 2026

Application Deadline: 28 August 2026

Start Date: 4 September 2026

ISIN: XS3398903404

APPLICATION FOR SIPP/SSAS PENSION TRUSTEES

4. TRUSTEE DETAILS (...continued)

Third Trustee

Full Name:	
Residential	
Address:	
	COUNTY
	POST CODE
Tax Residency:	
Date of Birth:	DD MM YYYY
Telephone No:	

Fourth Trustee

Full Name:	
Residential	
Address:	
	COUNTY
	POST CODE
Tax Residency:	
Date of Birth:	DD MM YYYY
Telephone No:	

5. PAYMENT DETAILS

All redemptions will be transmitted to the following bank/building society account. Payments can only be made into an account with a bank or building society within the UK Clearing system.

Bank / Building Society Name:	
Account Holder Name:	
Sort Code:	
Account Number:	
Building Society Reference or Roll Number	

6. SOURCE OF FUNDS - What has created / is generating the funds being used to open this plan?

☐ Accumulated Savings	☐ Pension Lump Sum	☐ Employment related (e.g. Bonus)	☐ Property Sale
☐ Inheritance	☐ Reinvestment of matured funds	☐ Transfer from another provider	

Other (please state):	
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7. INVESTMENT DETAILS (Minimum £3,000.00)

Product Name	Amount (£)*	Adviser Fee (£ or %)	Adviser Fee has been settled Directly with Customer (circle)
			YES NO

***Investment amount must be in whole pounds.**

Please submit the above investment amount by bank transfer to the details below:

Bank Name:	Natwest
Account Name:	Causeway Securities Limited
Sort Code:	60-00-01
Account Number:	49228609
IBAN:	GB89NWBK60000149228609
Payment Reference (MANDATORY):	Please use your pension scheme name

8. DATA PROTECTION – Use of your data

1-ɪ-dʒəŋθɪ-ə {SÓdzɪwúŋSá [ɣɪɣúŋSŋ ɪə 02YɣúŋSŋ ɪz 02wúŋ Rɪ-úɪ ɪɣɪ-002wúŋɪ-y0S 0úŋK úŋS 5ɪ-úɪ tɪzúS0úŋ2y ɪ0ú hɪɪmɣə² S ɣɪ-ɪ dʒəŋθɪwúŋ LɪSúə2ɣɪ Rɪ-úɪ 02
Lɪwúŋ0úŋR ɛ2dz 0úŋK áS0úŋ0Sá ɛ2dz wúŋSɪdzSá wúŋ2Y dʒəŋ ɣɪɪ-ɣɪS ɛ2dzwúŋ ɪ-002dzɪwúŋ ɣɪɪ-ɪS RŠ0áɪ2yá RŠ0S0ú ɪ-yŋ Lɪwúŋ0Sŋ wúŋɪ-dz Rɪwúŋ ɪ-ɣɪ-ɪəáá ɪ-yŋ ɪ-ááSááYŠyú ɪ-yŋ 02 Šyádzwúŋ
úŋKɪ-ú 0S 02Ywúŋ 0úŋK ɪS3ɪ ɪ-yŋ wúŋSɪdzɪ-ú2úə wúŋSɪdzwúŋSYŠyúá C2wúŋ ɣ0dzwúŋKŠwúŋ RŠ0ú ɪ-ɣɪ-ɪfɪ ɣɪ-ɪfɪ K20 0 1-ɪ-dʒəŋθɪ-ə {SÓdzɪwúŋSá [ɣɪɣúŋSŋ dʒəŋ ɛ2dzwúŋ ɪɣɪ2wúŋɪ-ú2y Lɪfɪ-ɪ-áS wúŋSɪ Rɪwúŋ 5ɪ-úɪ
tɪzúS0úŋ2y ɪ-úɪSYŠyú 2y 2dzwúŋ 0S0áúŋS 00 00 0-ɪ-dʒəŋθɪ-ə ɪ-əáS0dzwúŋSá02Y 2wúŋ ɪ-áɪ ɣɪwúŋ ɪ LɪwúŋúŋSŋ 02Lɪ0ə

Lk 2 Š Rž yZú øłāK ūz NŠÖŠlØŠ Y l-ŇlŠúŷy ȡyƳY l-ŷlzy ōē Ljžāú l-yŔ ūŠŦŠLJKzyŠ

.ē āiyay/y ūkŭā tɔw̄y ēdzu f-ɛw̄šš ūkf-ú šš f-y dzās l-yŕ řlātōtās ēdzdw l-yfzɔw̄y f-w̄zy/l-y ūkš ø f-ěā řšāōlwōřř l-y dzdw 5 f-ú f-t w̄zúššūāzy {ú f-úšy Šýűđ f-ā f-yšy řřš zww dzw ř-f-úšř
tɔw̄y úāys ūz ūāysø

9. DECLARATION

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- Lk ² S 02y7wNyw 0K1F0 0KS 1y72wNyw 10w2y 2w0S7y2w 0K1a 1LJ1w0F010w2y 1F0 0KS R10S 2F 02y7wNyw 1a 0w0dS7 02y7L7S0S 1yR 02wN0S00 02 0KS 0S0u 2F 2d2w 1y207S7R0S 1yR 0S0S70
- Lk ² S R0S0F1w0S 0K1F0 Lk 0S 2yR0S1w0u 1yR 0KS t7f1y7w0w20Kd0wN0S 1y070R1y3 0KS t7f1y7w0a1a 1yR 100S1w0 0KS 0S0wY0 1yR 2yR1w02y0 1yR 10wN0S 02 0S 02d2yR 00 0KS 0S0wY0 1yR 2yR1w02y0 2yR0S 0K10K 2d2w 1L71y7077 0S Y1y710S00
- Lk ² S 101y207S0S 0K1F0 1y72wN0S 02 02y7L70 0w0K 1w0 2070310w2y0 2yR0S 1y 010 7S0a7F010w2y 1F0d20S070 7S0d2w0u0a 1y1w0S7 Y10 0S 1wN0S0u Y0S0d2 02 1wN0S0R0S 1R0R0u0y7F 1y72wNyw 10w2y 1yR0K2w R20d2yS0y7F010w2y 1wN0S700S 02 0KS 010 0u10d20 2F Y0K2d2w 2wN0S7y0a7F010w2y 1yR 1y0 0w0d20S0S 0S00702w 1wN0S0S002w 2w 0S7y70a7F01w00 1k ² S 10wN0S 02 02y7L70 10 107 0wY0S0 0w0K 0d20K 1 1wN0S70S0u 7wN2y 1F0d20S070 7S0d2w0u0a 1y1w0S7 0w0K1y0KS 0wY0S 0wN0S0a7S0 00 1F0d20S070 7S0d2w0u0a 1y1w0S7 1y0u0a 1wN0S70S0u
- Lk ² S K10S 010S71y0 1yR 107 1yR0S1yS0yS0y 1R00S 1wN0S70u0S7 R2 y20 1wN0S70u0S 1y0 70d2w0KS0 02y0S0y 1yR 077 y20 0S 1y7wN0S70K 2F 1y0 1wN0S70702w0 2w 0w0d2u 1wN0S0a7y0 1yY1F1y3 0K1a 1y0S0uY0y0
- Lk ² S 10wN0S 02 1R00S 1F0d20S070 7S0d2w0u0a 1y1w0S7 0w0K1y on R100 1y 0w0u0y 2F 1y0 0K1y0S0 1y0KS 1y72wNyw 10w2y 02y7F01y0S7 1y0K1a ! 1LJ1w0F010w2yC2wY7 1y070R1y3 1y0 0K1y0S0 02 0KS 0w0d2u0S 127R0S0 1k ² S 10wN0S 02 1wN0S0R0S 0S0R0S0S 2F 0KS 0K1y0S 1F 1Y0K0S 1wN0S 10S7 020
- Lk ² S 02y7wNyw 0K1F0 Lk 0S K10S 0KS 70d7 1w20S0u 02 1y0S0u 1y0KS t7f1y0 1yR K10S 010S7 107 10702y7y0S0a71w0 02 1d2wK2w0aS 0KS 02y7L7S0w2y7F 0K1a 1LJ1w0F010w2y 1yR 0KS 1S0u02y00u 0wY0y 0K1a ! 1LJ1w0F010w2yC2wY7 K10S 70d7 1w20S0u 02y0S0u0a 1yR 1d2wK2w0u0 02 R2 02 2y2d2w 0S0K107
- Lk ² S 1wN0S 1070y3 2y0S0K107 2F 1 1wN0S0R0S 2F 0KS 1y0S7 7010S0 2w 1 070 7S0u02y070 1R0S7y0S7 0KS 1y0S7y07F0S0S7y0S 2R0S 2F 7wN0S7 10 1Y0S7R0R0 1yR 1K0S 077 y20 1000u0 1y0 1S0u02y00K2 1a 1wN0S0R0S 1y0KS 1y0S7 7010S0 2w 1 070 7S0u02y070 1070d2w0S 1y0y0S0S0u 1y0KS 0w0d2u0. 2yR0 1k ² S 10wN0S 02 1y72wNyw 02d2 1Y0S7R0R070S70 0K2d7R 1K0S 0S0S0S 1y02y3 02y7y0S0R0S 0w0K 0KS 0w0d2u 0S02y0S0 1 1wN0S0R0S7 2F 0KS 1y0S7 7010S0 2w 1 070 7S0u02y0
- Lk ² S 1wN0S 1070y3 2y0S0K107 2F 1 1S0u02y00K2 1a 1y0KS 1y0S7 7010S0 2w 0K2 1a 1 070 7S0u02y070 1R0S7y0S7 1y0S0d7F010w2y 7 2yR0S 0KS 1070 7S0d2w0u0a 1 00 2F 7wN0S7 10 1Y0S7R0R0
- Lk ² S 1d2wK2w0aS 1F0d20S070 7S0d2w0u0a 1y1w0S7 02 K27R 0KS 0d2000w0u0u02y0a7 t7f1y7y0S0uY0S0u0a 1y0S0u0a 1yR 1y0 2u0KS 1wN0K0u0 2w 1wN0S0S7R0 1y02y7y0S0u02y0 0w0K 2d2w 1y0S0uY0S0u0a 1yR 1y0 2u0KS 010K 1yR 2L7y2y7d2w 1wN0S70S0u 02 0wN0y0S7w 2w 1L70 02 0KS 70KS7y3 1y0 1y0S0uY0S0u0a7 1y0S0u0a7 1wN0K0u0 2w 2u0KS 1wN0S0S7R0 1y02y7y0S0u02y0 0w0K 0d20K 1y0S0uY0S0u0a
- Lk ² S 10wN0S 0K1F0 2d2w Y2yS0 077 0S 020S7 02 1wN0S0K10S 0S0d2w0u0a 1a 0d20S7 00 0KS 1a0d2w0
- Lk ² S 100S1w0 0K1F0 0KS t7f1y0 1y70S0u 077 2y70 1wN0S0R0S 1y1y7w07F 0u10S7y0y 2y0KS 0770S 2F 0KS t7f1y0
- Lk ² S 02y7wNyw 0K1F0 Lk 0S K10S 1wN0S7 1yR 2yR0S1w0u0a 02 YS0 1y72wNyw 10w2y 520d2yS0y 1yR t7f1y 1wN0Kd2w0S00u 1y070R1y3 t7f1y7w0a1a 1yR 0S7y0y 1S0u0w0u02y0a7 1yR 0KS 0S0wY0 1yR 2yR1w02y0 2yR0S 0K10K 02d2w t7f1y0 077 0S Y1y710S00

Notes:

[illegible]

Authorised Signatory		Date: ____ / ____ / ____
Full Name:		
Capacity		

Authorised Signatory		Date: ____ / ____ / ____
Full Name:		
Capacity		

- [illegible]

**PLEASE SEND COMPLETED APPLICATIONS INCLUDING THE
REQUIRED SUPPORTING DOCUMENTATION TO:**

Causeway Securities Limited,

PO Box 1378, St Albans, AL1 9SX

E: admin@uk.causeway-securities.com

Please note that we cannot accept your application unless you
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appropriateness of this investment assessed by an FCA
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