

Form IMA

Investment Manager Agreement

Name of Member or Scheme

Name of Investment Manager

- Original Contract Notes and/or Statements are to be forwarded to Pointon York SIPP Solutions Limited, with copies to the relevant client at their home address.
- Valuations of the account assets are to be sent to Pointon York SIPP Solutions Limited at normal valuation date, or upon request by Pointon York SIPP Solutions Limited or Crescent Trustees Limited.
- Investments can only be purchased using cash holdings on deposit for the relevant client and/or by encashment of his/her existing investments.
 - It is not permitted to make an investment without the means to settle it.
 - It is also not permitted to make a deal to sell assets before they have been paid for .
- Investments will be restricted to those permitted for SIPP's - details supplied on request.
- Purchases are at all times to be made in the name of "Crescent Trustees Ltd A/C Designation [followed by the SIPP designation number for the relevant client]".

Investment Manager Declaration

We acknowledge the above requirements and confirm our acceptance of them.

Company Name

FSA Authorisation No.

Position in firm/company

Signature

Date
Day Month Year