The Adviser SIPP

Change of Investment Risk Profile Form

01. Member Details

Surname	Full Forename	Date of Birth (DD/MM/YYYY)

Underlying investment platform	Plan number

02. Risk Profile

I confirm that my attitude to risk and corresponding risk profile has changed and should now be recorded as follows.

Please tick the box that applies to you:

Risk Category		Risk Profile	Risk Profile Definition
1	☐	Low	There is a limited degree of risk to the capital. Any growth is likely to be minimal.
2	☐	Lower to Medium	There is a small degree of risk to the capital with potential for moderate growth over the longer term.
3	☐	Medium	There is some risk to the capital with the potential for a reasonable return over the longer term.
4	☐	Medium to High	There is a chance of more growth over the longer term but with an increased possibility of the capital value declining too.
5	☐	High	There is potential for significant growth but also an increased exposure to high volatility and large swings in the value of investments.

Disclaimer - iPensions Group recommend that you seek advice from your appointed Adviser when changing your attitude to risk, which should include a detailed review of your existing investments, to ensure they are in line with your revised risk profile. iPensions Group will record your change in risk profile as notified to us on this form but will not make any amendments to your existing investments, unless specifically instructed by you or your appointed Adviser. Disinvestments may incur exit fees or dealing charges which should be confirmed to you by your Adviser. iPensions Group do not provide investment, tax or legal advice in relation to your investments. Please consult your Adviser for advice in these areas.

Member's Signature

Print Name

Date (DD/MM/YYYY)

Adviser's Signature

Print Name

Date (DD/MM/YYYY)