

Aviva Pension Employer Contributions Form

Please complete this form in **BLOCK CAPITALS**. All three pages of this form must be completed in all circumstances.

Part One - should be completed by the **employee**.

Part Two - should be completed by your **employer**.

- **For regular contributions** - The employee needs to complete Part One, and the employer needs to complete the relevant section of Part Two and the Direct Debit Instruction. The company contact should be someone in day-to-day control of the payments made by the company. The authorised signatory should be someone the company's bank knows is authorised to give them instructions, e.g. a director. Please then send them back to us at: myinvestmentportfolio@aviva.com. We'll then collect contributions by Direct Debit.
- **For a one-off contribution** - The employee needs to complete Part One, and the employer needs to complete the relevant section of Part Two. Please then send them back to us at: myinvestmentportfolio@aviva.com. We'll then send you the details you need to make the contribution by Direct Credit.

If you've got any questions about filling in this form, email us at: myinvestmentportfolio@aviva.com or call us on: **0800 285 1088**. We're open 8am to 5.30pm Monday to Friday. Telephone calls may be monitored and will be recorded and saved for at least five years. Calls to 0800 numbers from UK landlines and mobiles are free.

Part One

1. About You

Title (e.g. Miss/Ms/Mrs/Mr/Other)

First Name

Surname

Address

Post Code

National Insurance Number

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Telephone Number

Email Address

Aviva Pension Plan Number

Source of Wealth Information

Aviva asks for details about the source of funding for the investment as part of its commitment towards preventing financial crime, including money laundering. Obtaining this information also ensures that Aviva meets its legal and regulatory obligations. Aviva uses this information only for the purpose of preventing financial crime.

Please provide the details requested, we will be unable to proceed with your request without this information.

Employment Status

Employed Occupation

Self Employed Occupation

Individual's income before tax

< £20,000

£20,001 -
£30,000

£30,001 -
£40,000

£40,001 -
£50,000

£50,001 -
£75,000

£75,001 -
£100,000

£100,001 -
£250,000

> £250,000

Part One - continued

2. Your signature

By signing this form I declare that to the best of my knowledge the information I have supplied on this form is correct.

Your signature

Date

D	D	M	M	Y	Y	Y	Y
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Data Privacy

To learn about how Aviva processes personal information, please see our privacy policy at [aviva.co.uk/privacypolicy](https://www.aviva.co.uk/privacypolicy). It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible, so please check back in to see the latest version. A paper copy can be provided on request by writing to **Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR.**

Part Two

1. Employer/Business Details

Company Name

Company Registration Number

Head Office/Registered Address

Post Code

Company Contact Name

Company Email Address

Company Contact Address
(if different from above)

Post Code

Company Contact Telephone
Number

Date

D	D	M	M	Y	Y	Y	Y
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2. Employer/Business Contribution Details

For regular contributions

Employer contributions (Gross)

£

Employer contributions are paid gross. This means that no tax relief is claimed within the scheme. The employer/business may be able to claim tax relief for this contribution through its own tax return.

We only accept regular contributions by Direct Debit on 1st, 7th, 14th, 21st or 28th of the month. Please make sure your chosen date is at least 10 working days after we receive this form.

Frequency of payment (tick one) monthly quarterly half-yearly yearly

To start on

D	D	M	M	Y	Y	Y	Y
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Authorised signatory for company

Name (in block capitals please)

Part Two - continued

2. Employer/Business Contribution Details - continued

For one-off contributions

Employer contribution (Gross)

£

Employer contributions are paid gross. This means that no tax relief is claimed within the scheme. The employer/business may be able to claim tax relief for this contribution through its own tax return.

Bank details

Bank name

Account holder's name

Bank account number

Sort Code

We only accept one-off contributions by Direct Credit. When we've reviewed the forms, we'll then send you the details you need to make the contribution by Direct Credit.

Payment date

D | D | M | M | Y | Y | Y | Y

Authorised signatory for company

Name (in block capitals please)



INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY TO PAY BY DIRECT DEBIT



Aviva Pension Trustees UK Limited,
Wellington Row, York, YO90 1WR

Please fill in the whole form using a ball point pen and send to:

Aviva Pension Trustees UK Limited,
PO Box 520,
Norwich,
NR1 3WG.

Service user number

2	9	8	2	6	2
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Reference (Policy/Plan/Scheme Number)

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Instruction to your bank or building society

Please pay Aviva Pension Trustees UK 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 Aviva Pension Trustees UK Limited and, if so, details will be passed electronically to my bank/building society.

Name(s) of account holder(s)

Signature(s)

Bank/building society account number

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Branch sort code

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Name and full postal address of your bank or building society

To: The Manager	Bank/building society
Address:	
Postcode	

Date

D	D	M	M	Y	Y	Y	Y
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Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

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 Aviva Pension Trustees UK Limited will notify you eight working days in advance of your account being debited or as otherwise agreed. If you request Aviva Pension Trustees UK 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 Aviva Pension Trustees UK 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 Aviva Pension Trustees UK 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.



Get in touch

If you have any questions, you can:



Call us on: **0800 285 1088**

at the following times: **Monday to Friday
between 9am and 5pm.**

- Calls may be monitored and will be recorded.
- Calls may be charged and these charges will vary, please speak to your network provider.



Email us at:

myinvestmentportfolio@aviva.com



Write to us at: **Aviva, PO Box 520,
Norwich, NR1 3WG**

Need this in a different format?

Please get in touch if you require this form (RD01048) in large print, braille, as an audio or in a different colour.

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[aviva.co.uk](https://www.aviva.co.uk)

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