



# Your Premier SIPP Application Form

## Direct Clients

Clients not receiving financial advice from a Financial Conduct Authority regulated financial adviser

# Your Premier SIPP Application Form for Direct Clients

Before you complete this application you should read our SIPP key features document, terms & conditions and schedule of fees.

This application should be completed in full using CAPITALS. Boxes should be ticked.

Please return your completed application form along with certified copies of your identity verification documents (please don't send us your original documents) and other relevant information to:

Options UK Personal Pensions LLP, 2nd Floor, Fitzalan House, Fitzalan Court, Fitzalan Place, Cardiff CF24 0EL.

To request a copy of this application form in braille, large print or audio you can request this by calling us on 029 20557000, by email at [optionspremiersipp@optionspensions.co.uk](mailto:optionspremiersipp@optionspensions.co.uk) or writing to us at the address above.

## (SIPP to be established as execution only)

Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd ('trustee') will not provide you with legal, financial, investment, tax or other advice and aren't responsible for the suitability or appropriateness of your decision to set up a Self-Invested Personal Pension (SIPP).

This application should only be completed if you aren't receiving financial advice from a Financial Conduct Authority regulated financial adviser. You must ensure you understand the implications of this decision before proceeding. If you have appointed a financial adviser please complete our SIPP Application for Advised Clients.

Please answer the following questions before completing this application, if any of the answers are NO we will not process your application.

I have had the opportunity to read the key features document and the terms & conditions and acknowledge I have had the opportunity to ask any questions to confirm my understanding.

Yes

No

I have read and accept the current schedule of fees.

Yes

No

I accept and acknowledge that Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd have not provided any financial or investment advice.

Yes

No

I attach a cheque for the establishment fee (please refer to the schedule of fees) and accept this is non-refundable after the expiry of the cancellation period.

Yes

No

I consent to Options UK Personal Pensions LLP processing and holding my personal data to establish and administer my SIPP.

Yes

No

Please provide a short statement in your own words as to the reason for establishing the SIPP without receiving any financial advice from a Financial Conduct Authority regulated financial adviser.

The reason I want to establish a SIPP without the advice of a financial adviser is:

## 1. Personal Details

Title	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Permanent residential address	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>

Email is our preferred method of communication with you, but please tick your preference below:

	by phone	by email		
Date of birth	<input type="text"/>			
National Insurance Number	<input type="text"/>			
Status (please tick)	Single	Married/Civil partnership	Partnered	Other
Gender (please tick)	Male	Female	Non-binary	
Nationality	<input type="text"/>			
Is English your first language?	Yes	No		
If no please state	<input type="text"/>			

## Source of Wealth and Funds – must be completed for all applications

(Evidence may be required)

Please tick the boxes that best describe the origin of your personal wealth.

<input type="checkbox"/> Income from employment	<input type="checkbox"/> Divorce settlement
<input type="checkbox"/> Income from savings / investments	<input type="checkbox"/> Income from a lifetime annuity
<input type="checkbox"/> Pensions income from registered pension scheme	<input type="checkbox"/> Gift
<input type="checkbox"/> Inheritance	<input type="checkbox"/> Lottery or other gambling winnings
<input type="checkbox"/> Sale of a property	<input type="checkbox"/> Other, please specify <input type="text"/>

Please tick one or more of the following that you intend to use to fund your SIPP

<input type="checkbox"/> Transfer from a registered pension scheme	<input type="checkbox"/> Personal contributions
<input type="checkbox"/> Contributions from employer	<input type="checkbox"/> Contributions from a third party
<input type="checkbox"/> Pension sharing order	<input type="checkbox"/> Please state their name and relationship to you
Other, please specify <input type="text"/>	<input type="text"/>

## 2. Occupation & eligibility

Occupation	<input type="text"/>			
Job title	<input type="text"/>			
Approximate annual earnings	<input type="text"/> £			
Occupational status	Employed	Self-employed	Unemployed	Pensioner
	Full-time education	Caring for under 16s	Caring for person 16 or over	
	Other	<input type="text"/>		

If employed please provide employer details below:

Company name	<input type="text"/>
Companies House number	<input type="text"/>
Correspondence address	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
Name of company contact	<input type="text"/>

## 3. Pension protection

If you have applied to protect your lifetime allowance with HM Revenue & Customs (HMRC), they'll have issued you a confirmation of your personal lifetime allowance. If this applies please provide us with a certified copy of your protection certificate or details of your HMRC reference number with this application.

Do you have any pension protections?

## 4. Taking benefits (Retirement)

Please let us know in the box below, an age from 55\*, of when you would like to start taking your pension benefits. This does not affect your rights to begin taking benefits at any age permitted. If you leave this box blank, we assume you will start taking benefits at age 75.

Selected retirement age  Selected retirement date

If you intend taking benefits from your SIPP immediately from establishment and once monies have been received please let us know by ticking the box and we will send you required documentation

\*Please note that from 6th April 2028 you will normally need to be at least age 57 to start accessing benefits.

## 5. Contributions

### Personal contributions/Self-employed contributions

If you wish to make regular contributions please complete the Standing Order Mandate that is included in the application.

Any employer contributions are paid to your SIPP gross. This means that the amount of the contribution paid in to your SIPP is the total amount that will be credited to your SIPP. Personal and self-employed contributions are paid net of basic rate tax, provided you are under age 75 and within your tax relievable limit for the tax year. Further information on these limits and your responsibilities is available in our SIPP member fact sheet – contributions and tax relief, available on our website. The basic rate tax relief will only be added to your SIPP once HMRC pay the tax relief to us.

Please read the statements below and select the one that applies to you to confirm whether you are eligible for tax relief or whether any limits apply.

I have relevant UK earnings chargeable to income tax or general earnings from overseas crown employment subject to UK tax in this tax year (we will reclaim basic rate tax on personal contributions up to 100% of earnings or maximum personal allowance, whichever is the lower)

I have, or will have been a resident in the UK at some point during this tax year (we will reclaim basic rate tax on personal contributions up to 100% of earnings or maximum personal allowance, whichever is the lower)

My spouse/civil partner has general earnings from overseas crown employment subject to UK tax for this tax year (we will reclaim basic rate tax on personal contributions up to the gross of £3,600)

I, or my spouse/civil partner, are in overseas crown employment but for this tax year do not have relevant UK earnings subject to UK tax (we will not reclaim any tax relief on personal contributions)

None of the above (we will not reclaim any tax relief on personal contributions)

### Employer Contributions

Single contribution (gross) £

Regular contribution (gross) £

Commencement date

Frequency of regular contribution

We will need to confirm the identity of your employer who is making contributions and we may require documentary evidence of their identity. We will contact you if further information is required.

### Personal contributions/Self-employed contributions

Single contribution (net) £

Regular contribution (net) £

Commencement date

Frequency of regular contribution

## 5. Contributions (continued)

### Third party contributions – Individual

Title	<input type="text"/>		
Surname	<input type="text"/>		
Forenames	<input type="text"/>		
Permanent residential address	<input type="text"/>		
Telephone	<input type="text"/>		
Single contribution (net)	<input type="text" value="£"/>		
Regular contribution (net)	<input type="text" value="£"/>	Commencement date	<input type="text"/>
Frequency of regular contribution	<input type="button" value="Monthly"/>	<input type="button" value="Quarterly"/>	<input type="button" value="Annually"/>

You will need to provide documentary evidence of the identity of the third party.

### Third party contributions – company

Company name	<input type="text"/>		
Companies House number	<input type="text"/>		
Name of contact for company	<input type="text"/>		
Correspondence address	<input type="text"/>		
Telephone	<input type="text"/>		
Email	<input type="text"/>		
Single contribution (net)	<input type="text" value="£"/>		
Regular contribution (net)	<input type="text" value="£"/>	Commencement date	<input type="text"/>
Frequency of regular contribution	<input type="button" value="Monthly"/>	<input type="button" value="Quarterly"/>	<input type="button" value="Annually"/>

You will need to provide documentary evidence of the identity of the third party company.  
Please note that we will only accept cash contributions.

### Important Notes

- Where regular contributions are made by standing order, payments must be made from a UK bank or building society account in either your name for personal contributions, in your employer's name for employer's contributions or in the name of one of the third parties named above.
- Where contributions are received from a third party we will need to contact the third party for verification purposes, money laundering and data protection.

## 6. Transfers

Please copy or print this page if you have more than one transfer to complete

Name of transferring provider

Address of transferring provider

Name of transferring scheme

Policy/scheme number

Type of scheme    Occupational scheme    Personal pension scheme

Type of transfer    Cash    In-specie transfer

### Occupational scheme only

Money Purchase/Defined Contribution scheme

Final Salary/Defined Benefit scheme

For any Final Salary/Defined Benefit occupational scheme transfer you are required to seek appropriate advice from a financial adviser who is regulated by the Financial Conduct Authority (FCA) and provide us with a copy of the transfer value analysis service (TVAS) report and the advice. If the recommendation in the TVAS report and advice isn't to transfer a Final Salary/Defined Benefit scheme, then, we'll not process the transfer request.

### In-specie transfer details

Please provide a full schedule of assets you wish to transfer in-specie. We will only accept a transfer of assets (in-specie) which are allowable within our SIPP.

### Transferring scheme benefits

What is the estimated full value of the policy/scheme fund? £

If you are unsure please refer to the transferring scheme provider

Are you currently taking benefits from the policy?    Yes    No

If YES, are the scheme's assets already entirely or partially in drawdown?    Full    Partial

Do you intend to access your pension immediately? \*    Yes    No

If YES, have you already received Pension Wise/ Money Helper guidance?    Yes    No

If so, please provide your Pension Wise/ Money Helper appointment reference number and date of appointment

\*It is important that you either seek free and impartial guidance from the Pension Wise service on your retirement options and/or obtain appropriate independent advice from a qualified and FCA regulated financial adviser (please note financial advisers will charge you a fee for providing advice), before accessing your pension savings.

Pension Wise is a free and impartial guidance service available to you once you are 50 or over and they can help you understand the different ways you can take your pensions benefits. It's available online at [www.pensionwise.gov.uk](http://www.pensionwise.gov.uk) and they provide appointments over the phone or in person. Call 0800 138 3944 or go to [www.pensionwise.gov.uk](http://www.pensionwise.gov.uk) to book your appointment or Options UK can book the appointment on your behalf. Their guidance is impartial, they won't recommend any products or companies and they won't tell you how to invest your money, please get in touch if you would like us to do this for you.



## 6. Transfers (continued)

### Transferring scheme benefits (continued)

Are you currently taking income?

Yes

No

If YES, enter amount and frequency

£

Monthly

Quarterly

Half yearly

Annually

### Discharge forms

Have you already requested discharge forms?

Yes

No

We will write to your existing provider/company to initiate the transfer of your policy(ies) and request discharge forms. However, if you already have discharge forms please complete, sign and submit with this application.

1. I authorise and instruct you to transfer sums and assets from the transferring scheme listed above directly to your SIPP and to provide any instructions and/or discharge required by any relevant third party to do so.
2. I authorise Options UK Personal Pensions LLP, the transferring scheme provider, named above, and any appointed financial adviser named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to your SIPP.
3. I authorise Options UK Personal Pensions LLP, the transferring scheme provider and any employer paying contributions to any of the schemes as listed above to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to your SIPP.
4. Until this application is accepted and complete, Options UK Personal Pensions LLPs responsibility is limited to the return of the total payment(s) to the transferring scheme provider.
5. When payment is made to your SIPP as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the scheme listed above where the whole of the scheme is transferring, or that part of the scheme represented by the payment(s) if only part of the scheme is transferring.
6. I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Options UK Personal Pensions LLP and the transferring scheme provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.

Member Name

Member Signatures

Date



## 7. Investments

As you do not have a regulated financial adviser, your investment choices are the sole responsibility of you and/or your investment manager/adviser.

If you wish to appoint an investment manager to advise on your SIPP investments please complete the details below.

We or the trustee may refuse an investment for the reasons set out in Section 11 of the SIPP terms and conditions. We would always recommend regulated financial advice be obtained.

If you are applying for an unregulated investment without obtaining regulated financial advice, you must be an experienced investor and sophisticated client and we would require further information from you.

If, at any time your position changes and you appoint a financial adviser, you must inform us.

You are responsible for the ongoing review and monitoring of the investments you have chosen. All investments can go down in value as well as up. We, nor the trustee are responsible for any choices, decisions or monitoring of the investments.

Name of investment manager	<input type="text"/>
Address	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
FCA authorisation number	<input type="text"/>

### Type of investment authorisation

- |                |   |
|----------------|---|
| EXECUTION ONLY | Investment manager trades on your instructions only                           |
| ADVISORY       | Investment manager provides advice upon which you may act                     |
| DISCRETIONARY  | Investment manager manages your pension funds and reports on investments made |

### Investment Choice(s)

Name of investment provider/account	Amount to be invested £	%

### Property

Do you intend purchasing a commercial property within your SIPP?

Yes

No

(If YES, we will issue you with our property documentation and application.)

## 8. Verification of identity

We are obliged by law to verify the identity of our clients and to ensure that the information we hold is kept up-to-date. Our default approach is to use electronic identity verification checks. These checks will be made prior to the provision of any service as well as from time to time throughout our relationship.

This electronic check creates a “soft” footprint that will not be visible to any other party on your credit records; neither will it affect your credit rating.

I do not wish for an electronic check to be carried out

If you tick the box, or fail to pass electronic checks, in order to support your SIPP application and/or the payment of benefits we will require at least two separate documents to confirm identity, address and date of birth.

Please provide a certified true copy of either a passport or photo card driving license and a utility bill (not mobile phone) dated within the last 3 months.

Other options of evidence are available if you should not have these documents; please contact us directly for further information.

## 9. Online Viewing Access

In order to arrange a user name and password to gain access to view your SIPP data online through SIPP-Web please confirm the following:

I confirm I have read and agree to the SIPP-Web Terms and Conditions

I confirm should any of the data held by Options UK change then I agree to notify Options UK immediately

Full Name

Member Signature

Date of birth

## 10. Expression of Wishes

Please complete this form to tell us who you wish to receive benefits from your pension scheme if you die. You can continue on another copy of this form and attach it to this one if you wish to name more than three people as your "beneficiaries". The total as a percentage across the people you have named should add up to 100%.

By filling in this expression of wishes you can let the trustee know to whom you would like benefits to be paid and how the benefits are paid. The trustee will not be bound by your expression of wishes but will take it into account your wishes when exercising their discretion. This expression of wishes can be changed at any time and it is important that you keep this up to date with any new information and by sending new written signed instructions to us.

Members name

### Beneficiary / Nominee (delete as applicable)

Name

Address

Relationship to you

Date of birth

Amount or percentage of fund

### Beneficiary / Nominee (delete as applicable)

Name

Address

Relationship to you

Date of birth

Amount or percentage of fund

### Beneficiary / Nominee (delete as applicable)

Name

Address

Relationship to you

Date of birth

Amount or percentage of fund

Signed by Member

Date

**IMPORTANT NOTE:** A beneficiary may take either a death benefit lump sum or (in most cases) opt instead to leave the funds in a pension to draw on in the future. Any payment is taxed depending on your age when you die. If you are under 75 years old, benefits are normally paid tax free and if you are 75 years old or over when you die, tax will be charged at your beneficiary's individual marginal rate of income tax on anything they draw or are paid. This is subject to the benefits being paid out within 2 years of the date we are notified of the death.

## 11. Cancellation rights

You have a legal right to cancel your SIPP application within a 30 day period from the date of the letter confirming receipt of your SIPP application form, however, you are permitted to waive this legal right if you so wish.

Please tick **ONE** of the following to confirm your instruction

**I wish to waive my right to cancel my SIPP within 30 days of establishment.**

I understand this means that I will not be able to cancel my SIPP at a later date. The SIPP will be established upon receipt of all required documents and transfers will be requested. Contributions can commence and funds will be invested as per the instruction received.

OR

**I wish to retain my cancellation right to cancel my SIPP within 30 days.**

The cancellation period will commence from the date we confirm receipt of your SIPP application and provide you with the terms & conditions, key features documents and schedule of fees. Within this period no transfers will be requested, no contributions can be received and subsequently no investment or benefits will be actioned.

The cancellation period for the SIPP can be cancelled at any time by providing written instruction to Options UK Personal Pensions LLP.

**You must tick one box only and by signing the declaration on page 13 and 14 of this application you are instructing Options UK Personal Pensions LLP to proceed on the basis of your instruction as noted above.**

Cancellation rights in respect of transfers in cannot be waived. The 30 day cancellation period commences from the date the Cancellation Rights Notice is issued. Transfers are requested and the transfer can be cancelled at anytime within the 30 day period. Upon receipt of funds we will act upon any investment instruction received. Please note, if at any point there is an instruction to cancel the transfer and funds have been invested as per your instruction we accept no liability for any financial cost or loss of value attributable to the disinvestment. If the transferring scheme are unable to return the funds you will need to appoint another UK registered pension scheme to receive the funds.

## 12. Data protection

- All the information you provide to us, or a third party provides to us, in connection with your SIPP will be held by Options UK Personal Pensions LLP 'the administrator' and MK SIPP Trustees UK Ltd 'the trustee' as Data Controllers under the UK General Data Protection Regulation (UK GDPR).
- Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd will only use the information you have provided for the establishment and processing of your SIPP, for underwriting and actuarial calculation purposes, and for administration purposes only.
- Options UK Personal Pensions LLP are authorised under data protection legislation to maintain, process and store your personal data. We comply with all relevant data protection legislation at all times and are committed to the safeguarding of your data in line with the GDPR.
- Our lawful basis for processing data to administer the pension scheme is:
  - **Contract:** the processing is necessary to fulfil or prepare a contract for an individual
  - **Legal obligation:** the processing is necessary to comply within the law (not including contractual obligations)
- Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd may obtain from or pass to, the trustees, administrators, investment houses, your nominated financial advisers or insurers of any pension schemes of which you are a member, any information where it is necessary for the proper performance of our obligations under the plan to take place. We may also disclose information where required to do so by law, to legal and regulatory bodies and law enforcement agencies.
- Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd may disclose your personal information to third parties:
  - in the event that they sell or buy any business or assets, including the pension book, in which case they may disclose your personal data to the prospective seller or buyer of such business or assets;
  - if Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd or substantially all of their assets are acquired by a third party, in which case personal data held by them about their customers will be one of the transferred assets; or
  - If Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd are under a duty to disclose or share your personal data in order to comply with any legal obligation, or in order to enforce or apply the terms & conditions of our SIPP. This includes exchanging information with other companies and organisations for the purposes of fraud protection and credit risk reduction.

## 12. Data protection (continued)

- If you provide Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd with information about another person, you confirm that they have appointed you to act for them, to consent to the processing of their personal data including sensitive personal data and that you have informed them of Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd contact details and the purposes (as set out above) for which their personal data will be processed and the disclosures that will be made to the parties listed above.
- If you supply false or inaccurate information it is a serious offence and could terminate your pension plan and may lead to prosecution.
- If any of your information changes you should inform Options UK Personal Pensions LLP as soon as possible at 2nd Floor, Fitzalan House, Fitzalan Court, Fitzalan Place, Cardiff CF24 0EL.
- You have rights around the processing of your data which include but are not limited to: the right to be informed; the right of access; the right of rectification; the right to restrict processing. For further information you can contact the Information Commissioners office, you can also refer to our terms and conditions.
- You have a legal right to access any information that we hold on record about you. We will require this request in writing. If the request is made by a third party on your behalf we will require a signed letter of authority from you to support this request. If you would like to make such a request please contact the Compliance Department.
- Options UK Personal Pensions LLP will hold your data indefinitely and have implemented safeguarding measures for your data in the event of you taking full benefits or transferring to another scheme. For further information on this please request a copy of our Data Retention Policy.

By signing this application you are:

- consenting to the information provided on this form and/or in the supporting documentation being disclosed to the parties listed above and used for the purposes set out on this form.
- consenting to any personal or special category data provided on this form or in any supporting documentation being disclosed to the parties listed above only if necessary and for the purposes set out in this form.

## 13. Declaration

- I hereby apply for membership of the SIPP that is being established under your SIPP;
- I acknowledge and accept your SIPP terms & conditions and schedule of fees and agree to be bound by the scheme rules of your SIPP;
- I confirm I have had the opportunity to read the key features document, terms and conditions and all aspects of the application and acknowledge I have had the opportunity to ask any questions to confirm my understanding;
- I consent to Options UK Personal Pensions LLP, obtaining, processing and storing my personal data and where necessary special category data to administer my pension scheme;
- I confirm that all details and declarations provided are correct and complete to the best of my knowledge and belief;
- I agree and consent to Options UK Personal Pensions LLP carrying out checks to verify my identity, residence and source of wealth and I agree to supply any further information required to complete these checks;
- I agree to a scheme bank account being established and agree that all monies will be routed through this account;
- I give my authority to accept correspondence by email from Options UK Personal Pensions LLP and for MK SIPP Trustees UK Ltd to accept instructions by email from myself and/or investment manager from the email addresses detailed in the application and email addresses associated with the investment manager;
- I agree to notify Options UK Personal Pensions LLP of any change to my personal details or circumstances;
- I hereby consent to Options UK Personal Pensions LLP requesting the transfer of my policies listed in the application;
- I hereby consent to Options UK Personal Pensions LLP obtaining details from any pension scheme, arrangement or contract of which I have been a member and authorise the giving of any such information to Options UK Personal Pensions LLP;

## 13. Declaration (continued)

- I confirm that the total contributions to any registered pension schemes in respect of which I am entitled to tax relief will not exceed the higher of (i) the basic amount (currently £3,600) or (ii) 100% of my relevant UK earnings (within the meaning of section 189 of the Finance Act 2004) for that tax year;
- I will notify Options UK Personal Pensions LLP if an event occurs, as a result of which I will no longer be entitled to tax relief on my contributions, by the later of (i) the next 5th April or (ii) 30 days after the event occurs;
- I also confirm that, if I intend making contributions that are not to benefit from tax relief (for example 'excess' contributions), I will inform Options UK Personal Pensions LLP in writing;
- I understand that by signing this application form I am declaring that I am aware of my annual allowance (including any carry forward) and request that the scheme administrator reclaims tax on my contributions unless I instruct otherwise;
- I confirm that I wish for Options UK Personal Pensions LLP to appoint the investment manager as detailed in the application;
- I understand that Options UK Personal Pensions LLP and MK SIPP Trustees UK Ltd are not in any way able to provide me with any advice;
- I confirm that I am establishing the SIPP without having taken regulated, professional financial advice and that I do not intend to take such advice in respect of the purchase, retention or sale of any investments held within the SIPP. I understand the implications of this;
- I confirm that I have not received any advice from Options UK Personal Pensions LLP or MK SIPP Trustees UK Ltd in relation to the transfers I have requested from my other pension schemes to your SIPP or the investments I have instructed Options UK Personal Pensions LLP to make;
- I confirm I understand the value of my SIPP can go down as well as up depending on the performance of the investments chosen.

Member Name

Signed

Date

## Additional Support

If you have any further information you would like to provide us with or if there is any additional support you require from us please let us know in the box below.



PART OF



GROUP PLC

FOR MORE INFORMATION PLEASE CONTACT  
OPTIONS UK PERSONAL PENSIONS LLP

2<sup>nd</sup> Floor, Fitzalan House,  
Fitzalan Court,  
Fitzalan Place,  
Cardiff CF24 0EL

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