

How do I add a Self Invested Personal Pension (SIPP)?

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Plans, Assets and Accounts form the building blocks for SIPPs. In order to input a SIPP as a holding you need to add a SIPP and then add the Plans, Assets or Accounts as part of that SIPP.

To add a SIPP click on the **Add** button on following screen:

The screenshot displays a dashboard with several sections, each containing a table and an 'Add' button. The 'SIPPs' section is highlighted with a red box around its 'Add' button.

Platforms (0)						
Name	Provider	Product	Status	Value	Assigned To	Add (+)
						Total value of Platforms £0.00

SIPPs (0)						
Name	Provider	Product	Status	Value	Assigned To	Add (+)
						Total value of SIPPs £0.00

Plans (1)						
Name	Provider	Product	Status	Value	Assigned To	Add (+)
Test Plan	Sample Provider	Sample Test Plan	In Force	£40,320.01		[Icons]
						Total value of Plans £40,320.01

Assets (1)				
Name	Type	Value	Assigned To	Add (+)
Cyprus Holiday Home		£30,000.00		[Icons]
				Total value of Assets £30,000.00

Accounts (1)					
Name	Provider	Product	Value	Assigned To	Add (+)
Test Bank Account	Bank	Savings Account	£10,000.00		[Icons]

Input the SIPP details

The screenshot shows the 'SIPP Details' form with the following fields:

- Name: Aviva
- Provider Name: Aviva Wrap UK Ltd
- Product Name: Aviva Wrap Pension Portfolio
- Contract Number: 1234567
- Status: In Force
- Start Date: 18/11/2013
- End Date: (empty)

Buttons: 'Get details via Contract Enquiry' and 'Delete', 'Revert'.

Then select SIPP Holdings using the following tab:

- Details
- SIPP Holdings
- Underlying Assets
- Performance

SIPP Details

Name *

Provider Name

Product Name

Contract Number

[Get details via Contract Enquiry](#)

Status In Force

Start Date

End Date

Once in the tab, you have the option of adding in **Plans, Assets and Accounts** using the **Add** button.

- Details
- SIPP Holdings
- Underlying Assets
- Performance

SIPP Holdings

Get policy valuation by: Manual Plan, Asset and Account Entr

Plans (0)

Name	Provider	Product	Status	Value	Assigned To		Add
							Total value of Plans £0.00

Assets (0)

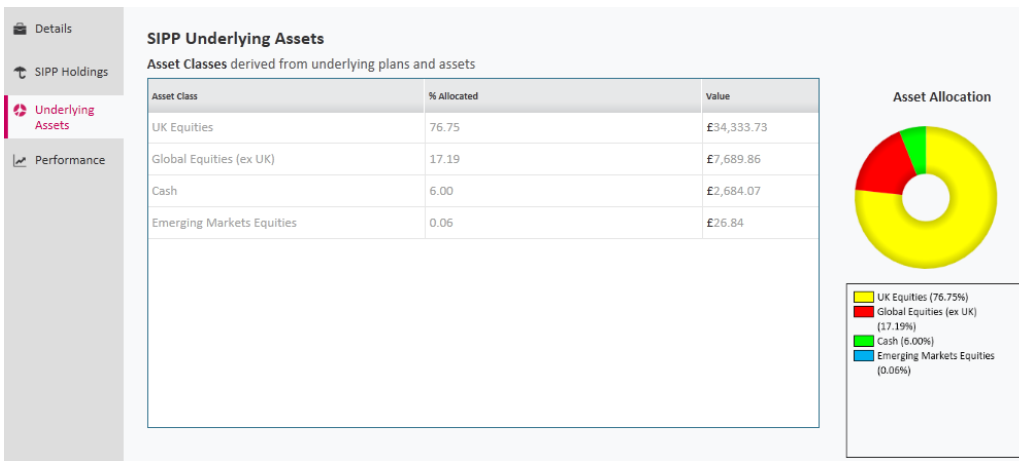
Name	Type	Value	Assigned To		Add
					Total value of Assets £0.00

Accounts (0)

Name	Provider	Product	Account #	Value	Assigned To		Add
							Total value of Accounts £0.00

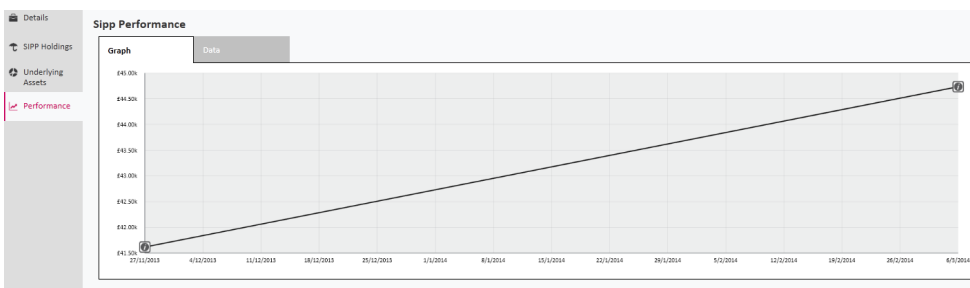
Follow the instructions for plans, assets or accounts as above.

You also have the option of accessing the Underlying Assets tab to give an overall picture of the plans, assets and accounts that make up the SIPP.



You can also access the Performance tab, from here you can see the overall performance of the SIPP.

You should note that it is only possible to create valuation points within the plans, assets or accounts that make up the SIPP and not the SIPP itself.



Once completed click on **Save and Close**



The SIPP details will then show as follows:

▼ SIPPs (1)

Name	Provider	Product	Status	Value	Assigned To	Add
Test SIPP	Sample Provider	TEST SIPP	In Force	£20,550.15		📄 📄 🗑️
▶ Assets (0)						
▶ Accounts (0)						
▼ Plans (1)						
Name	Provider	Product	Status	Value	Assigned To	
TEST ISA			In Force	£20,550.15		📄 📄 🗑️

Total value of SIPPs £20,550.15