Standard Life

PRSA and personal pension top-up form

For financial advisers

PTUP V01 0926

Your client's details

First names

Surname

Existing policy number to be topped up

Salary/ income €

Salary/income means gross earnings (before tax) in a year (including bonus/ commission/BIK).

Contribution details

Employer single PRSA contribution €

Employee single PRSA or PP contribution €

Employee single PRSA AVC €

Make the payment by direct credit/EFT by paying **Standard Life International Designated Activity Company**, **IBAN: IE81 HSBC 990231 37001649**, quoting reference: policy number, client surname, first name, and date of birth (dd/mm/yyyy)

Please give account details from where money was drawn

International Bank Account Number (IBAN)

Name on account

Investment choice

☐ Invest this top-up in the same funds and proportions as your client's existing policy at the time this top-up is allocated.

or

Invest in the following Standard Life funds

Funds	%

If any of your client's current funds are closed to new investments for this policy type, the top-up will be invested proportionally across your client's remaining investment funds (excluding Self-Directed Options and the policy cash account).

For fund choice, see the product's investment options guide or fund range leaflet on **standardlife.ie/fundrange**

Financial adviser and commission details

Personal Pension

Same commission basis as last single premium top-up to this policy ☐ or

Initial (% of premium) % (Max 5.00%. If nil, insert 0%)

FBRC (% of fund) % (Max 1.00%. If nil, insert 0%)

FBRC only available on Synergy Personal Pension.

☑ I am not aware of any conflicts of interest in relation to this policy.

Financial adviser's name

Financial adviser's email @

Date (DD/MM/YYYY)

The existing PRSA policy's pricing structure has already been set for all contribution types. If the top-up pricing structure is to be different then your client must complete and sign a new application (SYPRSA or SYPRAVC) as a new policy will need to be set up. For more information, see **standardlife.ie/adviser/prsa**

Due to the nature of this product, it is important to ensure that it remains suitable for your client. We recommend that you engage with your client on a regular basis to ensure its ongoing suitability.

Source of wealth

Tell us how your client acquired the money you are investing. Tick all that apply.

- ☐ Compensation payment
- ☐ Inheritance
- ☐ Salary/bonus
- ☐ Sale of company
- ☐ Divorce settlement
- ☐ Lottery/betting win
- ☐ Sale of investments
- ☐ Savings
- ☐ Gift
- ☐ Policy claim/maturity
- ☐ Sale of property
- ☐ Other

Additional details

Under anti-money laundering regulations, we are obliged to keep customer information up to date. Therefore, we may request evidence of identity and address if what we have on file is expired or not recent. If we ask for up to date verification, we may not be allowed to carry out instructions until it is provided.

In certain circumstances, we may request further information.

Politically exposed persons

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations. If your client is a PEP, or a close relative or close associate of a PEP, we must apply enhanced customer due diligence procedures. You may be required to provide additional information and documentation (such as your client's source of funds, wealth, and identity).

A PEP is an individual who is, or has at any time in the last 12 months held one of the following positions, in Ireland or abroad:

- head of a state or government, or a minister
- member of a parliament or similar legislative body
- member of the governing body of a political party
- member of a supreme court, constitutional court or other high-level judicial body
- member of a court of auditors or board of a central bank
- an ambassador, chargé d'affaires or high-ranking officer in the armed forces
- member of an administrative, management or supervisory body of a state-owned enterprise
- director, deputy director, or member of the board of (or person performing the equivalent function in relation to) an international organisation

Is your client, or any other party to this application, now, or previously been a

- politically exposed person (PEP)
- close relative of a PEP, or
- close business associate of a PEP?

Yes ☐ No ☐

If yes, please give details.

Role* in policy	Role holder's name	Role holder's relationship to PEP	PEP	Position held by PEP
For example, trustee	*Anne Murphy-Smith*	*Daughter-in-law*	*Hugo Smith*	*Director, UK Post Office*

*Policy owner or employer.

Data Protection Notice – Using your personal information

We're committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers' personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information.
You can get a copy of our Privacy Policy on our website: **standardlife.ie/privacy**

+353 1 639 7900 **standardlife.ie** prsa_newbusiness@standardlife.ie

Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.

Standard Life International dac is regulated by the Central Bank of Ireland. Standard Life International dac is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, Dublin D02 F653.

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