

Before you complete this form

Please read your Personal Quotation and Key Features document (RIOTAKF1), given to you by your financial adviser.

ANN30 V07 0518

Part 1 - Your financial adviser's company details

To be completed by your financial adviser

Financial adviser's Standard Life agency code /

Financial adviser's company name

Part 2 - Annuitant personal details (compulsory)

Tick this box if you're already a customer of Standard Life Please give us one of your policy numbers

Title

First names (in full)

Surname

Email

Address

Date of birth (DD/MM/YYYY)

Home phone number

Personal Public Service number

Mobile phone number

We may use your email to help manage your policy. If you don't want us to use it, leave it blank.

Proof of your identity (for example, a certified copy of your passport or driving licence) must be sent in with this application, unless we already have it on file.

Part 3 - Source of purchase money (compulsory)

Name of pension provider Amount due

Type of pension fund

Personal pension (RAC) ARF or AMRF Company pension scheme (including AVC scheme) Buy out bond (Personal retirement bond) PRSA (including AVC PRSA)

The existing pension provider should pay out any cash lump sum requested before sending us the annuity purchase price.

Is the amount due subject to, or as a result of family law proceedings? (for example, Pension Adjustment Order, Property Adjustment Order, Financial Order) Yes No

If Yes, enclose a copy of the Notice or Order. We'll then let you know what further information we'll need.

Separate annuities must be set up where proceeds relate to separate employments and self-employments.

Part 4 - Annuity details (compulsory)

Purchase price € (minimum €2,500) **Gross annuity at outset** € pa

Payment to be In arrears In advance

Increases in the annuity

0% pa 3% pa Other* % pa (maximum 5% pa)

'Final remuneration' of scheme employment** € and Revenue 'maximum benefit limit'*** € pa

Guaranteed period

None 5 years Other years (maximum 10 years)

The annuity is payable for your lifetime or the guaranteed period chosen, whichever is longer. The guaranteed period applies to your annuity only, not to any spouse/civil partner's annuity. If you want your spouse/civil partner to get an income after your death, the maximum guaranteed period you can choose is 10 years.

* If more than 3% and this is a company pension scheme annuity, increases will be restricted to CPI if Revenue maximum benefits would be breached.

** Only required if source is a company pension scheme (including AVCs). You should also enclose supporting documents, for example, P60s).

Part 5 - Spouse/civil partner's annuity (optional)

Amount

1/2 of principal annuity 2/3 of principal annuity Other (please specify) %

Title

First names (in full)

Surname

Personal Public Service number N N N N N N N L (L) Date of birth (DD/MM/YYYY)

For personal pension and PRSA annuities, if you choose a guaranteed period and a spouse/civil partner's annuity, your spouse/civil partner's annuity will start on your death (so, if you die within the guaranteed period, they will get 2 payments for the remainder of the guarantee period).

For occupational pension scheme annuities, if you choose a guaranteed period of 5 years or less, the principal annuity will be with overlap. If more than 5 years, it will be without overlap.

With overlap: your spouse/civil partner's annuity starts on your death.

Without overlap: your spouse/civil partner's annuity starts on your death or the end of the guaranteed period, whichever is later.

Proof of your spouse/civil partner's identity (for example, a certified copy of your passport or driving licence) must be sent in with this application, unless we already have it on file.

Part 6 - Annuity payments (compulsory)

Frequency Every month Every 3 months Every 6 months Once a year

To ensure the correct taxes are deducted from your payments, the Revenue require us to have an up to date Certificate of Tax Credits. Contact the Revenue on (01) 702 3011 - have your PPSN to hand (Standard Life's 'employer' number for annuities is 0064349F).

Please tick to confirm you have contacted the Revenue

Please provide your bank details below. Your annuity payments will be lodged to this account.

Your International Bank Account Number (IBAN)

Name on your account

Your annuity payments will be credited to your bank account on the 1st of the month in which your payment is due. Your 1st payment may be credited on the 15th, depending on when we process your application. Payments must be lodged to your own or jointly owned personal bank account. Payments cannot be made by cheque. The minimum annuity payment each frequency is €65 (before tax).

'Emergency' taxes will be deducted if we don't receive your Certificate on time.

Your IBAN is shown on your bank statement. (The last 14 characters of your Irish bank account's IBAN are your old 6 digit branch sort code (1st digit = 9) and old 8 digit account number).

Part 7 - Your financial adviser's declaration (compulsory)

To be completed by the financial adviser

- 1. I confirm that in accordance with Regulation 6(1) of the Life Assurance (Provision of Information) Regulations, 2001, my client has been given in writing the information specified in Schedule 1 of those Regulations, and that
- 2. I have advised my client as to the financial consequences of replacing an existing policy with this policy of cancellation or reduction, and of possible financial losses as a result of such replacement.
- 3. I have explored the available investment options with my client and taking into account their circumstances, long term needs, age and attitude to risk, I am satisfied that this policy is suitable for them.
- 4. I have completed all checks to verify the identity, address, source of funds, and source of wealth of:

Names

to the standards set out in the anti-money laundering and counter financing of terrorism regulations, which I will forward to Standard Life on request.

Financial adviser signature

Date (DD/MM/YYYY) Financial adviser's name

Initial (% of purchase price) Nil Renewal

% (Max 2.00%)

Issue policy to

Financial adviser Client

Signature

For office use only

FPPC

Part 8 - Your declaration

WARNING: If you propose to take out this policy in complete or partial replacement of an existing policy, please take special care to satisfy yourself that this policy meets your needs. In particular, please make sure that you are aware of the financial consequences of replacing your existing policy. If you are in doubt about this, please contact your insurer or insurance intermediary.

1. We have read the Data Protection Notice in the Key Features document and we agree that our personal information may be used for the purposes described.
2. We agree that the information given in this form is true and complete whether in our handwriting or not.
3. We agree that a copy of this application can be treated as the original for all purposes.
4. We agree that the contract will be governed by the Policy Schedule, Quotation, and the Policy Provisions (RIOTA60), together with this Application Form and any associated statements or questionnaires submitted in connection with this application.
5. We agree that the contract will be governed by Irish law.
6. We have received in writing and read the information as stated in (1) and (2) of our Financial Adviser's Declaration (Part 7).
7. I, the annuitant, authorise any pension provider, Trustee, administrators, Qualifying Fund Manager or government agency to provide details of any pension or annuity arrangement currently or previously applying to me that Standard Life may require, at any time, but only for the purpose of administering this annuity.

Annuitant's signature



Date

(DD/MM/YYYY)

We would like to contact you from time to time to keep you up to date with products and services, company news and other promotions. If you want us to keep you up to date, please choose how you'd prefer us to contact you:

Email

Phone

Post

Text

To read our Privacy Policy, visit www.standardlife.ie/privacy


Signature

You can update your consent and preferences at any time, just let us know.

tick all that apply

and (if applicable) for and on behalf of, as Purchaser:

Trustees of

pension scheme

Trustees' signatures



Date

(DD/MM/YYYY)

Scheme address


Signature

If you are receiving advice from a financial adviser, remember that the adviser is acting on your behalf, not only by giving you advice, but also regarding how this form is filled in and sending us this completed application and cheque in payment of the purchase price. By filling in this form you are applying to enter into a contract with Standard Life. This application will be the basis of this contract if it is accepted by us. A copy of this completed application form will be made available on request. Until the application is accepted, Standard Life's liability is limited to a return of the purchase price. If this application is accepted, we will not wait for further instructions from you. We will commence the policy based on the date your completed application and cheque are received and your policy documents will be issued.

(01) 639 7000 www.standardlife.ie customerservice@standardlife.ie

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