

## Before you complete this form

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

**ANN30 V13 0523**

## 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: [www.standardlife.ie/privacy](http://www.standardlife.ie/privacy)

If you're providing information about another person, please inform them that you have provided this information and recommend they read our Privacy Policy to understand how we manage and use their data.

## 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

Eircode

Date of birth (DD/MM/YYYY)

Home phone number

Mobile phone number

Personal Public Service 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 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 or PEPP)  
  ARF  
  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 your pension (or has it ever been) subject to any 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.

Ask your pension provider or Qualifying Fund Manager to send us the cheque accompanied by a letter with your pension/approved retirement fund's policy details. If they're paying by direct credit, pay Standard Life International, IBAN: IE22 HSBC 990231 37001644, and quote reference: your surname, first name, and date of birth (dd/mm/yyyy).

\*\*\* Only required if source is a company pension scheme (including AVCs). You should also enclose supporting documents, for example, copy of Employment Detail Summary).

### 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 copy of their 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

### Make sure your tax credits are correct

When we process our first payment to you, we're required to update Revenue online as your new or additional 'employer' so that tax can be deducted. **You need to ensure that you are registered for PAYE, and that your tax credits are allocated the way you want, especially if you have more than one income.**

Please tick the appropriate box below:

**I'm already registered with Revenue for PAYE**  
We'll set you up on our payroll and request a Revenue Payroll Notification.

**I'm not yet registered with Revenue for PAYE**  
You'll need to contact Revenue to register for PAYE, and then we'll set you up on our payroll and request a Revenue Payroll Notification.

Once you're set up on our payroll, you can then re-allocate tax credits directly with Revenue, and they'll issue a new Tax Credit Certificate to you (and new Revenue Payroll Notification to us).

Register or update your PAYE details with Revenue on [www.revenue.ie/myaccount](http://www.revenue.ie/myaccount) or (01) 738 3636. We're required to deduct 'emergency' taxes where we don't have a Revenue Payroll Notification for you. Standard Life's 'employer' number for annuities is 3587289KH.

### 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).

**PAYE registration is required where you're receiving a pension income, even if you've been self-employed up to now, and/or will continue to be.**

If you invest in a Standard Life ARF and Standard Life annuity or Standard Life Vested PRSA, separate payments will be made, regardless of payment dates.

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).

## Politically exposed persons

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations.

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

Are you, 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 the PEP
<i>For example, annuitant</i>	<i>Anne Murphy-Smith</i>	<i>daughter-in-law</i>	<i>Hugo Smith</i>	<i>Director, UK Post Office</i>

If you are 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 source of funds, wealth, and identity).

\*Trustee, annuitant or spouse of annuitant.

**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 by 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, attitude to risk, and product suitability, 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 my client named in Part 2, 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.
5. I confirm my client fits the product's target market  Yes  No

For product's target market, refer to Brokerzone.

If No, please outline why you are recommending this product:

**Financial adviser signature**

**Date**

(DD/MM/YYYY)

Financial adviser's name

**Initial** (% of purchase price)

% (Max 2.00%) Nil Renewal

**Issue policy to**

Financial adviser  Client

Special instructions and/or additional information

  
**Signature**

**Part 8 – Your declaration (compulsory)**

**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 on page 1, 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.

To read our Privacy Policy, visit [www.standardlife.ie/privacy](http://www.standardlife.ie/privacy)

**Annuitant's signature**



  
**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

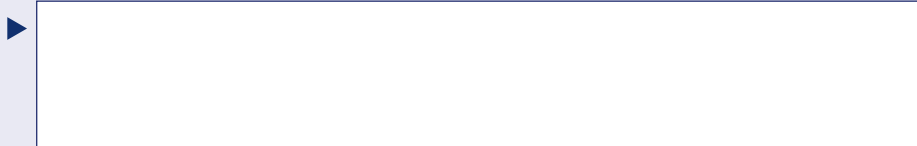
You can update your consent and preferences at any time, just let us know.

tick all that apply

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

Trustees of  pension scheme

**Trustees' signatures**



  
**Signature**

**Date**

(DD/MM/YYYY)

Scheme address

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 purchase price payment are received and your policy documents will be issued.



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

(01) 639 7000 [www.standardlife.ie](http://www.standardlife.ie) [customerservice@standardlife.ie](mailto:customerservice@standardlife.ie)

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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