

Instruction to invest/switch into a structured deposit

Barclays Euro Structured Deposit

SYSD31 V03 1122

Important notes

Use this form if you

- have an existing policy, and want to move (switch) some of your investment within your policy into this structured deposit (a Self-Directed Option), or
- have just completed a Synergy application to invest in a new policy, where you've instructed us to invest in this structured deposit (you don't need to complete Part 4 overleaf)
- want to top up your existing policy, and are enclosing a cheque for the top up amount (the structured deposit amount may be less as part may be required to be held back in your policy's cash account to pay for charges throughout the term)

If you have more than one policy where you want to switch funds, you must complete a separate form for each. You must read the structured deposit key features document, and structured deposit key information document, available from your financial adviser.

Investment choices are made at your own risk, so it's important to get the appropriate financial advice.

Investment products like this can be difficult to understand, that's we require you to talk to a financial adviser. Standard Life does not give financial advice.

When you are getting advice from a financial adviser, you should remember that they are acting on your behalf, not only by giving advice, but also regarding the completion of this form.

If the terms change in the period between Standard Life receiving your completed application and/or payment, and Barclays receiving the payment from us, you will be given the option of accepting the revised terms, or an option not to proceed.

Data protection

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

Minimum structured deposit investment
€500,000, maximum
€5,000,000

Part 1 – Details of the Barclays structured deposit (Please refer to the relevant structured deposit key features document)

Term	<input type="text"/>	years	Deposit rate	<input type="text"/>	% CAR
Issue Date	<input type="text"/>		Maturity Date	<input type="text"/>	
	(DD/MM/YYYY)			(DD/MM/YYYY)	

Structured deposits option only available on Synergy policy numbers beginning AB, AR, AS, BB, EP, PP, and RP.

* A certain amount will be held back in your policy's cash account to pay for charges over the term. That amount will depend on your investment choices and current balance in the account. Also any distributions/tax and/or regular withdrawals from your policy that may fall due during the term.

Part 2 – Your policy details

Policy number (if switch or top up)

or

New policy. Number not yet allocated, see Synergy application form dated:

(DD/MM/YYYY)

Policyowner 1

Policyowner 2

Part 3 – New policy or existing policy top up

I want to invest* € in the above Barclays structured deposit.

Part 4 - Switching your existing funds

I want to **sell a portion of my funds:**

Fund name (see your last policy statement)	% to be sold
	%
	%
	%
	%
	%

And with the proceeds of those units lodged to my policy's cash account, I want to invest*

€ in the above Barclays structured deposit.

For example, if you want to sell half of your Managed fund units: insert 'Managed fund' and '50%'. If you want to switch an equal percentage of all your funds, just write that percentage in the '% to be sold' box.

A charge will be applied if you switch units more than 12 times in any 12 month period.

* A certain amount will be held back in your policy's cash account to pay for charges over the term. That amount will depend on your investment choices and current balance in the account. Also any distributions/tax and/or regular withdrawals from your policy that may fall due during the term.

Part 5 - Important information

Warning: The value of your investment may go down as well as up. You may get back less than you invest

Warning: If you cash in this structured deposit before the maturity date you may lose some or all of the money you invest

Warning: If you invest in this structured deposit you will not have any access to your money until the maturity date

- Barclays Bank Ireland plc provide the capital security on this structured deposit (but your policy's charges will reduce the net return)
- In the event of Barclays Bank Ireland plc being unable to meet any claims against it, money from your policy held with that provider will not be covered by schemes such as the Deposit Guarantee Scheme
- If Barclays Bank Ireland plc fails to pay us as promised, we won't make up any shortfall. You could lose some or all of the deposit invested
- Standard Life does not endorse or recommend any deposit or deposit provider and is not responsible for the solvency of a deposit provider or a deposit's performance

Part 6 - Your declaration and authorisation

1. I instruct Standard Life to make the changes as set out in this form.
2. I have received and read the structured deposit key features document, and structured deposit key information document.
3. I accept the terms and conditions set out in the structured deposit key features document.
4. I have read and accept the important information in Part 5.

Policyowner signatures
(all policyowners must sign)



Date
(DD/MM/YYYY)



Signature

If under trust: all trustees must sign. If assigned to a lender: lender must also sign.

Part 7 – Your contact details

Policyowner 1 email
@

Mobile phone number Home phone number

Policyowner 2 email
@

Mobile phone number Home phone number

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:

Policyowner 1 Email Phone Post Text
Policyowner 2 Email Phone Post Text

If you're investing in a new Synergy policy, you don't need to complete Part 7, as we'll use your contact details as completed on your Synergy application. If you're switching funds or topping up an existing policy, we'll update our records with your contact details as given in Part 7.

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

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

Tick all that apply

What happens next?

Send this completed instruction to Customer Service Division, Standard Life, 90 St Stephen's Green, Dublin, D02 F653.

- For existing policy switch requests, we will carry out your instructions as soon as possible. Normally, this means:
 - If Standard Life receives this switch request before 3pm, this switch will be processed using the prices that apply 2 working days after receipt (for example, if received at 10am on Tuesday, the switch will be processed using Thursday's prices)
 - If your request is received after 3pm, the switch will be processed using the prices that apply 3 working days after receipt (for example, if received at 5.30pm on Tuesday, the switch will be processed using Friday's prices)
 - In exceptional circumstances, if we have to delay switching, we'll use the fund prices on the day the transaction takes place – these prices could be very different from the prices on the day you made the request. For up to date fund restrictions, see Products and funds trading (PTR) on www.standardlife.ie/fundrange
- After your deposit has been transferred to the deposit provider, we'll send you confirmation
- There'll be a period where your money will sit in a 0% interest account with the deposit provider until the structured deposit issue date
- If there's an over-subscription or other reason why your structured deposit investment request doesn't proceed, we'll let you know that the money's being refunded to your policy's cash account, and ask for your further instructions

Prices are normally, but not necessarily, declared each working day.

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

SYSD31_Generic V03 1122 © 2022 Standard Life. All rights reserved.
SCOZ1122383696-001