

Filling in this form

Please complete this form if you wish to make a claim where the life assured on savings and investment policies has died. The life assured is the person covered by the policy.

If the life assured has other policies with Standard Life, and they are the sole policy owner, please also complete the death claim instruction form for personal pensions and PRSAs (PPDCI) or ARF and AMRF (ARFDCI), as appropriate.

If there is more than one executor or administrator appointed to manage the life assured's estate, all must sign this form. Similarly, if there are multiple trustees or policy owners, they must all sign.

If 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.

SIDCI V01 0120

If there is more than one life assured on the policy, the death benefit may only be payable on the death of the last surviving life assured, or on the death of the first life assured to die. Your policy documents will tell you which.

Part 1 - Policy details

Policy number

Policy number

Policy number

Policy number

Part 2 - Life assured (deceased) details

Surname

Date of birth **Date of death**

Part 3 - Your personal details

Claimant 1

Title

First names
(in full)

Surname

Email

@

Address

Mobile
phone number

Home phone
number

Capacity in which
you're claiming

 executor administrator trustee trust
beneficiary policy
owner

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

Claimant 2

Title

First names
(in full)

Surname

Email

@

Address

Mobile
phone number

Home phone
number

Capacity in which
you're claiming

 executor administrator trustee trust
beneficiary policy
owner

Part 4 - Your instructions

How are the proceeds to be distributed?

Please select as appropriate, ensuring it adds up to the total savings and investment death claim from Standard Life.

1. Reinvest € in an investment bond with Standard Life
and/or
2. Lodge € to my bank account* or my solicitor's bank account for distribution

International Bank
Account Number (IBAN)

Name on bank account

* Payments must be lodged to your own or jointly owned personal bank account.

Please allow at least 5 bank working days from when your request has been processed for payment to reach the account.

Part 5 - Your declaration

I instruct Standard Life to pay the proceeds of this claim as set out in this form.

Claimant 1
Signature



Date
(DD/MM/YYYY)

Claimant 2
Signature



Date
(DD/MM/YYYY)

If there is more than one executor, administrator or trustee appointed, or policy owner, all must sign.


Signature


Signature

Checklist

You'll need to enclose **certified copies*** of one of each of the following:

Proof of identity for **each claimant**, for example:

- Current passport
- Current EU or UK driving licence

and

Proof of address for **each claimant**, for example:

- Recent bill (electricity, phone or gas)
- Recent bank statement
- Recent document from Revenue or Department of Social Protection

You'll also need to enclose **certified copies*** of:

Death certificate

Will where the total claim from Standard Life is less than €60,000 (if there is a will)

Grant of probate where the total claim from Standard Life is €60,000+ (or, if no will, grant of letters of administration)

Recent bank statement, if payment going to your bank account. If payment going to solicitor's client account, a letter from solicitor (on their headed paper) confirming their bank details

If you're re-investing with Standard Life, enclose the completed investment bond application form as well.

* To get certified copies of your documents, photocopy the originals, bring the originals and copies to a post office, bank, Garda station or qualified accountant/financial adviser. They'll check, stamp and sign each copy to certify it's a true copy of the original. Enclose those certified copies with this form.

Recent means issued in the last 6 months and current means not expired. If you don't have a particular document, contact us or your financial adviser about alternatives.

What happens next?

Send this completed instruction, together with the documents listed in the checklist to your solicitor, your financial adviser or Standard Life at 90 St Stephen's Green, Dublin D02 F653.

We will review your instructions and documents. If we need more information or documents, or there is likely to be a delay, we will let you know. If there's extra life cover (protection/death benefit) under the policy, we may have to ask for medical evidence (for example, from the deceased's doctor) or other information (for example, proof of date of birth of deceased) to assess your claim. If the circumstances of the death are unusual (for example, there's a post mortem; only an interim death certificate available; they died abroad) the assessment may take longer. We reserve the right to request a grant of probate (or letters of administration) where the death claim is less than €60,000.

If the policy holds Self-Directed assets that need to be sold or cashed in, we will instruct the relevant provider. Some assets may take some time to sell. The sale value could be very different to the value on the day you instruct us.

Privacy notice

We collect, process and maintain claimant personal information and apply safeguards to ensure that it is protected and used in accordance with data protection law. To read our Privacy Policy, visit www.standardlife.ie/privacy

(01) 639 7000 www.standardlife.ie 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 2. Standard Life International dac is part of the Phoenix Group and uses the Standard Life brand under licence from the Standard Life Aberdeen Group.

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