

**SYBOB30 V44 0223**

### Before completing this form

Please read your Personal Illustration, Key Features document (SYBOBK1), Investment Options guide (SYIO1) and Self-Directed Options Guide (SYSDO1), given to you by your financial adviser. If you are transferring your pension from the UK, please also read the UK pension transfers guide (SYUKPT1).

### What this form is for

This form should be used to make an investment in a Synergy Buy Out Bond using the proceeds of a transfer out of an

- Irish company pension scheme
- Irish buy out bond (personal retirement bond)
- UK personal pension policy
- UK company pension scheme
- UK Section 32 policy

Until this application is accepted, Standard Life's liability is limited to the return of the transfer payment to your original pension provider.

Where there is more than one pension scheme being transferred, please complete a separate application for each scheme.

### 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 – Your personal details

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

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.

\* Minimum age is 18 maximum 70.

## Politically exposed persons

We are also required to identify politically exposed persons (PEPs).

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.

Your relationship to PEP	PEP	Position held by the PEP
For example, daughter-in-law	Hugo Smith	Director, UK Post Office

We may need to verify your identity and address to process your application. If you don't provide suitable documents/information to us, we may be required to stop processing and discontinue doing business with you. Similarly, after the policy is written, if we ask for up to date verification, we may not be allowed to carry out your instructions until it is provided.

## Part 3 – Transfer payment details

Amount of transfer payment  (€5,000 minimum)

Normal Retirement Age\*

Is your transfer payment (or has it ever been) subject to any family law proceedings? (for example, Pension Adjustment Order)  Yes  No

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

Do you require a 'Willing and able' letter to be sent to the transfer provider?  Yes  No

If yes please give policy number and name of transfer provider

Policy number

Name of transfer provider

The transfer payment is from a UK personal pension  or Irish or UK company pension scheme

**If the transfer is from a UK personal pension, please complete Part 4a, if from an Irish or UK company pension scheme, Part4b.**

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).

You should ensure that the transfer payment includes any money coming from separate AVC contracts or insurers and any payment for late interest. If this transfer payment is made up of previous transfer payments, please provide details of those transfer payments also. The transfer payment can be made by direct credit payment to Standard Life International, IBAN: IE51 ULSB 985010 05292222. Please quote reference: member surname, first name, and date of birth (dd/mm/yyyy)

\* Must match the retirement age of the scheme you are transferring from. The Normal Retirement Age stated here must agree with any other simultaneous buy out bond (except where pension splitting applies).

### Part 4a – Your UK personal pension details

#### Complete only if your transfer payment is from a UK personal pension

Name of plan

HMRC reference number of the transferring plan

Your UK National Insurance number

### Part 4b – Your company pension scheme details

#### Complete only if your transfer payment is from a company pension scheme

Amount of transfer payment which represents AVCs €

Name of plan

Revenue/HMRC reference number

If from UK pension, your UK National Insurance number

Scheme type Defined Benefit  or Defined Contribution

Was the member a proprietary director (20%) at any time within the last three years of the relevant employment?  Yes  No

Has the member given up their right to take a tax-free lump sum as part of a redundancy package from the relevant employment?  Yes  No

Please give the transferring member's pension details as set out in either (a) or (b)

(a) (i) Maximum tax-free lump sum entitlement at transfer date €

(ii) Revenue 'maximum benefit limit' €

**or**

(b) (i) Date of joining relevant employment (DD/MM/YYYY)

(ii) Date of leaving relevant employment (DD/MM/YYYY)

(iii) Final salary from relevant employment. Alternatively, please enclose copies of the members's three largest consecutive yearly Employment Detail Summaries (or P60s) within the last five years of the relevant employment (within ten years for proprietary directors (20%)) and their Employment Detail Summary for the year they left the relevant employment (or P45). €

Additional Voluntary Contributions may have different options available at retirement.

Relevant employment means the employment relating to the pension scheme which you are transferring out of.

The Synergy Buy Out Bond satisfies the Qualifying Recognised Overseas Pension Scheme rules and is registered with HM Revenue & Customs (reference QROPS500126).

We strongly recommend that you enclose proof of your final salary now, to save you having to provide it when you retire, when we'll need it to calculate your retirement benefits and tax (a Revenue requirement).

## Part 5 – Your investment choice

In order to complete this section, refer to the Investment Options guide (SYIO1) and the Self-Directed Options guide (SYSDO1)

Indicate how your transfer payment as set out in Part 3 is to be allocated.

Funds €  and/or Self-Directed Options €

If you choose to invest in Self-Directed Options, your investment will initially be placed in your Policy Cash Account. You must have enough money in this account to enable us to carry out your instructions and to pay the charges related to the Self-Directed Options that you have selected. Please refer to the Self-Directed Options guide (SYSDO1), or contact your financial adviser for further information.

### Funds

Choose from the following Standard Life funds

Absolute Return Global Bond Strategies (ARGBS)	<input type="text"/> %	Global Index Fund 60	<input type="text"/> %	MyFolio Market III	<input type="text"/> %
Asia Pacific Equity	<input type="text"/> %	Global Index Fund 80	<input type="text"/> %	MyFolio Market IV	<input type="text"/> %
Cautious Managed	<input type="text"/> %	Global Index Fund 100	<input type="text"/> %	MyFolio Market V	<input type="text"/> %
China Equity	<input type="text"/> %	Global Inflation Linked Bond	<input type="text"/> %	North American Equity	<input type="text"/> %
Corporate Bond	<input type="text"/> %	Global Real Estate	<input type="text"/> %	Property	<input type="text"/> %
Diversified Income	<input type="text"/> %	Global REIT	<input type="text"/> %	Total Return Credit	<input type="text"/> %
Euro Global Liquidity	<input type="text"/> %	Global Smaller Companies	<input type="text"/> %	UK Equity	<input type="text"/> %
European Equity	<input type="text"/> %	Japanese Equity	<input type="text"/> %	UK Smaller Companies	<input type="text"/> %
European Ethical Equity	<input type="text"/> %	Managed	<input type="text"/> %	Vanguard Emerging Market Stock Index	<input type="text"/> %
European Smaller Companies	<input type="text"/> %	Multi-Asset ESG	<input type="text"/> %	Vanguard Euro Government Bond Index	<input type="text"/> %
Fixed Interest	<input type="text"/> %	MyFolio Active I	<input type="text"/> %	Vanguard Eurozone Stock Index	<input type="text"/> %
Global Absolute Return Strategies (GARS)	<input type="text"/> %	MyFolio Active II	<input type="text"/> %	Vanguard Global Bond Index	<input type="text"/> %
Global Corporate Bond SRI	<input type="text"/> %	MyFolio Active III	<input type="text"/> %	Vanguard Global Corporate Bond Index	<input type="text"/> %
Global Equity	<input type="text"/> %	MyFolio Active IV	<input type="text"/> %	Vanguard Global Stock Index	<input type="text"/> %
Global Equity Impact	<input type="text"/> %	MyFolio Active V	<input type="text"/> %	Vanguard US 500 Stock Index	<input type="text"/> %
Global Index Fund 20	<input type="text"/> %	MyFolio Market I	<input type="text"/> %		
Global Index Fund 40	<input type="text"/> %	MyFolio Market II	<input type="text"/> %		

If you wish to invest in funds, indicate the relevant percentage in the table below. For example, if you indicated above that you wish to invest €10,000 in Funds, and you want all of this amount to be invested in the Standard Life Managed Fund, you would insert **100%** beside **Managed**.

## Self-Directed Options

### Execution only stockbroking

- Tick this box if you are selecting execution only stockbroking. We will pass your details to Stocktrade who will contact you directly.
- Tick this box if you want to set up a Stocktrade online account now to deal or view (Stocktrade account charges will apply)^
- Tick this box if you're an Irish national. If you're not, or you have dual nationality/citizenship, please give details

Nationality

National client identifier\*

Please indicate which income band applies to you

- Under €20,000     €20,000 to €34,999     €35,000 to €49,999     €50,000 to €74,999     €75,000+

You'll also need to attach copies of one of each of the following:

- Proof of identity, for example
- Current passport
  - Current EU or UK driving licence
- and**  Proof of address, for example
- Recent bill (electricity, landline phone or gas)
  - Recent statement (bank or credit union)
  - Recent document from Revenue or Dept of Social Protection

You are only allowed to trade in investments that are permitted by Standard Life. If it comes to our attention that you have bought non-permitted investments, we will instruct Stocktrade to sell those investments. In these circumstances, your policy will be charged the cost of selling those investments. If you are uncertain as to whether a particular investment is permitted, contact your financial adviser or Standard Life.

### Deposits

Deposit provider	Deposit amount €	Deposit account term
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

^ Stocktrade will use your email address given in Part 2 to set up your online account. An additional charge applies for each deal arranged by post, email or fax.

\* This could be your passport number or personal identity code, depending on country. For example, in UK, it's your National Insurance number. For other countries, see Execution-only stockbroking form (SYEOS1).

Current means not expired and recent means issued in the last 6 months.

If you don't have a particular document, talk to us or your financial adviser about alternatives.

There are minimum investment amounts applied by the Deposit providers. Please see [www.standardlife.ie](http://www.standardlife.ie) for the minimums that apply.

## Authorising Standard Life to accept instructions from your financial adviser on your behalf

Note that we will only accept instructions from authorised persons once we are satisfied that we have verified the identity of the authorised person, and it is the responsibility of the authorised person and/or yourself to verify that your instructions have been carried out properly.

I authorise Standard Life to accept instructions from my financial adviser named in Part 1, to buy or sell Funds and Deposits under this policy.

This authorisation will apply until Standard Life receives a written instruction from me changing or withdrawing my authorisation.

Policy owner's signature

Date

(DD/MM/YYYY)

Please speak to your financial adviser before completing this section.

  
Signature



## Part 7 – Your declaration

### Please read carefully before signing

**WARNING: If you propose to take out this policy in complete or partial replacement of any 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. I have read the Data Protection Notice on the next page, and I agree that my personal information may be used for the purposes described.
2. I agree that a copy of this application can be treated as the original for all purposes.
3. I understand that the benefit under this pension policy is governed by Chapter 1 or 2 of Part 30 of the Taxes Consolidation Act 1997 as amended, and benefits under this policy cannot be surrendered, assigned or commuted.
4. I declare that the information provided in this and other related forms (if any) are true and complete to the best of my knowledge and belief, whether in my handwriting or not.
5. I consent to Standard Life seeking relevant information relating to my past, present, future employments and pension arrangements from any employers, trustees, administrators or pension providers and I authorise the giving of such information.
6. I agree that the contract will be governed by the Policy Schedule, Statement of reasonable projection and Policy Provisions (SYBOB60), together with this Application Form and any associated statements and questionnaires submitted in connection with this application.
7. I have received in writing and read the information specified in my financial adviser's declaration (Part 6).
8. I accept that, depending on my tax residency status, and only relating to transfer payments from a UK pension, (a) movement of funds from this policy will be reported to HM Revenue & Customs, and (b) if an overseas transfer charge should become payable, it will be deducted from this policy and paid to HM Revenue & Customs.
9. I agree that the contract will be governed by Irish law.

**Policy owner's signature**  
(policy owner named in Part 2)

**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

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 any transfer. 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 will be sent to you on request.

1. We declare that the information given is true and complete to the best of our knowledge and belief.
2. We confirm that ARF options are available under the terms of the scheme.
3. We have read the Data Protection Notice on the next page, and we agree that our personal information may be used for the purposes described.

**Trustees of pension scheme signatures**

**Date**  
(DD/MM/YYYY)

To be completed by policy owner and, if applicable, trustees

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

  
**Signature**

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

Tick all that apply

Trustees signatures are not required if the transfer payment is coming from an existing buy out bond.

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

  
**Signature**

## 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.

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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