

Filling in this form

Please complete this form if you wish to make a claim on personal pension and PRSA policies where the policy owner has died.

The personal representative of the deceased policy owner should complete this form.

The personal representative is the person named as executor in the deceased's will who accepts the responsibility of managing their estate. Where there is no valid will, or the executor named is unable or unwilling to act, the court will appoint an administrator instead. If there is more than one executor or administrator appointed, all must sign this form.

If the deceased policy owner has other policies with Standard Life, please also complete the death claim instruction form for savings and investments (SIDCI) or ARF and AMRF (ARFDCI), as appropriate.

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.

Part 1 - Policy details

Policy number

Policy number

Policy number

Policy number

Are any of these policies (or have they ever been) subject to any family law proceedings (for example, Pension Adjustment Order)? Yes No

If yes, enclose a certified copy of the notice or order. We'll then let you know what further information we'll need.

Part 2 - Policy owner (deceased) details

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY)

Date of death (DD/MM/YYYY)

Part 3 - Your personal details

Personal representative 1

Title

First names (in full)

Surname

Email
@

Address

Mobile phone number Home phone number

Relationship to the deceased policy owner

Personal representative 2

Title

First names (in full)

Surname

Email
@

Address

Mobile phone number Home phone number

Relationship to the deceased policy owner

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

Checklist

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

- Proof of identity for each personal representative**, for example:
- Current passport
 - Current EU or UK driving licence

and

- Proof of address for each personal representative**, 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 personal representative's 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

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