

What this form is for

You can use this form to set up

- employee regular monthly contributions by salary deduction by completing Parts 1, 2, 3 and 4, and getting your employer to sign Part 5, and complete and sign a direct debit instruction (SDDN)
- employer regular monthly contributions to your PRSA, by completing Parts 1, 2 and 3, and getting your employer to sign Part 6, and complete and sign a direct debit instruction (SDDN)
- an employer single contribution to your PRSA by completing Parts 1, 2 and 3, and getting your employer to sign Part 6

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: standardlife.ie/privacy

Part 1 – Employment and PRSA details (Compulsory)

| | |
|----------------------------------|---|
| Employer company name | |
| Employer company address | |
| Employer tax registration number | |
| Employer contact phone number | |
| PRSA owner/employee name | |
| PRSA owner/employee's salary pa | € |
| PRSA policy number | |

Part 2 – Contributions (Compulsory)

| | | |
|---|---|----------------------------------|
| Employee regular monthly contribution by salary deduction | € | payable by monthly direct debit |
| Employer regular monthly contribution | € | |
| Total regular monthly contribution | € | |
| Date of first monthly regular contribution** (dd/mm/yyyy) | | payable by cheque/bank draft/EFT |
| Employer single contribution | € | |

Source of funds

| | |
|-----------------------------------|--|
| International Bank Account Number | |
| Name on account | |

** Please ensure date of first monthly contribution from the employer's bank account to the employee's policy and salary deduction start date match.

Benefit-in-kind will apply if employer contribution is more than 100% of employee remuneration in year of assessment.

Employer contributions will be invested in the proportions currently applied to contributions to the policy, until the employee/policy owner instructs us otherwise.

For employee contributions deducted from salary, and employer contributions, the money must be drawn from the employer's account, and paid by direct debit to Standard Life.

Part 3 – Politically exposed persons (Compulsory)

We are 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.

| Role^ in policy | Role holder's relationship to PEP | PEP | Position held by PEP |
|--|-----------------------------------|-------------------|---------------------------------|
| <i>For example, one of the principal shareholders of employer co</i> | <i>daughter -in-law</i> | <i>Hugo Smith</i> | <i>Director, UK Post Office</i> |
| | | | |
| | | | |

^ Company director of employer, principal shareholder of employer company, PRSA policy owner/employee.

Part 4 - Your instruction to your employer to deduct from your salary

- Please deduct from my salary until further notice, the PRSA contributions agreed by me in Part 2, and any increase in contributions, and remit these contributions to Standard Life

Employee/PRSA owner signature

Date

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To allow us to collect contributions each month from your employer's bank account, your employer will need to complete

- a direct debit instruction (SDDN) and
- sign Part 5 of this form if they agree to deduct your regular employee contributions from your 'gross' salary and/or
- sign Part 6 of this form if they are paying employer contributions to your PRSA

Part 5 - Your employer's declaration and agreement to deduct from your salary

Your employer must sign this part if they agree to deduct contributions from your salary and pay them into your PRSA policy.

- I have received approval from Revenue** to operate a Net Pay arrangement for pensions
- I agree to deduct the contributions as outlined in Part 2, and remit these contributions to Standard Life
- I have read the Data Protection Notice overleaf, and I agree that my personal information may be used for the purposes described

**Authorised signature,
for and on behalf of employer**

Position of signatory within
employer company

Date

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** Pensions Branch, Revenue Commissioners, Castle View, 52-57 South Great George's Street, Dublin D02 HF50. Employers should inform Revenue when its Net Pay arrangement for pensions first starts.

Part 6 - Your employer's declaration if paying employer contributions to your PRSA policy

Your employer must sign this part if they are paying employer contributions into your PRSA policy.

- I accept that an employer contribution paid in excess of an employee's emoluments in the year of assessment will incur a benefit-in-kind charge for the employee
- I confirm that the PRSA owner named in Part 1 is a salaried PAYE employee of this company
- I have read the Data Protection Notice above, and I agree that my personal information may be used for the purposes described

**Authorised signature for and on
behalf of employer**

Position within employer company

Date

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What happens next?

Please return this form with the employer payment and/or direct debit instruction, to your financial adviser, or Standard Life at 90 St Stephen's Green, Dublin D02 F653.

When we receive these, we'll act on your instructions and confirm the change. If appropriate, we'll also issue a PRSA 1 Net Pay Certificate (or PRSA 2 if an AVC PRSA), which you should give to your employer so they can deduct contributions from your salary.

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 **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 D02 F653.

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Your policy number

(which will be your Unique Mandate Reference)

Please complete a separate direct debit for each policy number.

SDDN V06 1122

Direct debit instruction

By signing this mandate form, you authorise

(a) Standard Life to send instructions to your bank to debit your account, and

(b) Your bank to debit your account in accordance with the instruction from Standard Life.

As part of your rights, you are entitled to a refund from your bank under the terms and conditions of your agreement with your bank. A refund must be claimed within 8 weeks, starting from the date on which your account was debited. Your rights are explained in a statement that you can obtain from your bank.

Name on account

Address on account

Eircode

International Bank Account Number (IBAN)

Type of payment: Recurrent

Accountholder signatures



Date

(DD/MM/YYYY)

If your bank account is a joint account and requires two signatures, please ensure this mandate is signed by both parties.

Some banks may not accept direct debit instructions for some types of accounts (for example, most savings accounts). If in doubt, please consult your bank.

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).



Signature

Creditor: Standard Life International dac

Creditor Identifier: IE09ZZZ304935

Please return this mandate to Standard Life, 90 St Stephen's Green, Dublin, D02 F653.

Instead of posting, you can scan and email it to us at customerservice@standardlife.ie

If you scan and email documents containing your personal information, be aware that there's no guarantee that any email you send us will be received, or that it will remain private and unaltered during internet transmission.

For more information on SEPA, visit the Banking & Payments Federation Ireland website, www.bpfi.ie

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

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