

**Before you complete this form**

Please read your Personal Illustration (pre-sale), Key Features document (SYPPKF1), Investment Options guide (SYIO1) and Self-Directed Options guide (SYSDO1), given to you by your financial adviser.

**SYPP30 V49 0324**

**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](http://standardlife.ie/privacy)

**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

Mobile phone number

Proof of identity (for example, copy of unexpired passport or driving licence) must be sent in with this application. Name on proof must match your photo ID.

We may use your email to help manage your policy. If you don't want us to use it, leave it blank. If you're choosing execution-only stockbroking with Stocktrade, we'll need your email.

\* Minimum age is 18, maximum is 74.

**Please complete the checklist after Part 9 - Your declaration.**



## 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.

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).

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

## Part 6 – Source of your transfer payment

### Must be completed for transfer payments

If your contribution is a transfer payment, please give Insurer name and policy number

Insurer name	Policy number
--------------	---------------

Is your pension (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 further information we'll need.

## Part 7 – 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 contribution as set out in Part 4 is to be allocated. If you have more than one contribution type (for example a monthly contribution of €250, plus a €5,000 single contribution) and you want a different fund choice for each type, please make a copy of this part and complete it for each contribution type.

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





**Part 8 – Your financial adviser's declaration (cont.)**

(i) Pricing option

A  B  C  D  E  F  G  H

I  For term to NRA ≥ 1 and < 5 complete years J  For term to NRA ≥ 1 and < 5 complete years K  For term to NRA < 1 complete year

The pricing structure you select at policy set up stage determines the annual management charge rebate for all contributions and transfer payments.

No commission is payable for a term of less than one year.

(ii) Regular Initial (% of premium)

Nil  or  % (If Front: max 25.00%. If Level or age 65+ max 5.00%)

(iii) Regular Renewal (% of premium)

Nil  or  % (If Front: max 2.00%. If Level: max 5.00%)

(iv) Regular FBRC (% of fund)

Nil  or  % (Max 1.00%) payable^ Monthly  Quarterly  Half-yearly  Yearly

^If FBRC chosen, and payable frequency not ticked, we'll pay it monthly.

(v) Single/transfer Initial (% of premium)

Nil  or  % (Max 5.00%)

(vi) Single/transfer FBRC (% of fund)

Nil  or  % (Max 1.00%) payable^ Monthly  Quarterly  Half-yearly  Yearly

**Financial adviser signature** ▶

  
**Signature**

**Date**

(DD/MM/YYYY)

Financial adviser's name

If there are questions relating to this application, email me at

Special instructions and/or additional information

## Part 9 – 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 page 1, and I agree that my personal information may be used for the purposes described.
2. I have received in writing and read the information specified in my financial adviser's declaration (Part 8).
3. 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.
4. I agree that a copy of this application can be treated as the original for all purposes.
5. I declare that the information provided in this and other related forms (if any) is true and complete to the best of my knowledge and belief, whether in my handwriting or not.
6. I agree that the contract will be governed by the Policy Schedule, Statement of reasonable projection and Policy Provisions (SYPP60), together with this Application Form and any associated statements or questionnaires submitted in connection with this application.
7. I agree that the contract will be governed by Irish law.
8. I agree that the benefit under this pension policy is governed by Chapter 2 of Part 30 of the Taxes Consolidation Act 1997 as amended, and benefits under this policy cannot be surrendered, assigned or commuted.

**Policy owner signature**



**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 the contribution. 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. We will start the policy immediately or on the start date you have given us, whichever is later, and your policy documents will be issued. There may be a delay in collecting the first contributions while the direct debit is set up with your bank.

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

  
**Signature**

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

tick all that apply

## Avoiding delays – Your checklist

All the information we ask for is essential to set up and administer your policy. Any missing information will cause a delay.

These are the most commonly missed:

### Part 1 – Your financial adviser's company details

- Standard Life agency code
- Company name

### Part 2 – Your personal details

- Your name and contact details
- Enclose your proof of identity (for example, copy of unexpired passport or driving licence)

### Part 4 – Your contributions

- Distinguished between regular and single

### Part 7 – Your investment choice

- Your investment choice
- Funds total adds up to 100%
- Deposits: include provider name and term

### Part 8 – Your financial adviser's declaration

- Declaration completed in full

### Your payment

- Cheque enclosed/direct credit payment completed
- Direct debit mandate completed

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](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

**SYPP30** V49 0324 ©2024 Phoenix Group Management Services Limited. All rights reserved.  
SCOZ0723033234-001

**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

**Account holder 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).



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](mailto: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](http://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.

(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.