

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).

SYBOB30 V31 0317

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)
- Irish personal pension policy as a result of a Pension Adjustment Order (splitting)
- 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

9 /

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

Date of birth*
(DD/MM/YYYY)

Home
phone number

Personal Public
Service number

Mobile
phone number

* Minimum age is 18.

Part 3 - Transfer payment details

Amount of transfer payment € (€5,000 minimum)

Normal Retirement Age*

Is the transfer payment subject to, or as a result of 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
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The transfer payment is from a personal pension ☐ or company pension scheme ☐

If the transfer is from a personal pension, please complete Part 4a, if a company pension scheme, Part 4b.

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.

* 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 personal pension details

Complete only if your transfer payment is from a personal pension

Name of plan from which transfer payment originates

Revenue/HMRC reference number of the transferring plan

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 scheme from which transfer payment originates

Revenue/HMRC reference number of the transferring scheme

Is the scheme 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

(a) (i) Transferring member's 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)

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(ii) Date of leaving relevant employment

(DD/MM/YYYY)

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(iii) Final salary from relevant employment.

Alternatively, please enclose copies of the members's three largest consecutive P60s within the last five years of the relevant employment (within ten years for proprietary directors (20%)) and their P45 from the relevant employment.

€

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).

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 funds

Absolute Return Global Bond Strategies (ARGBS)	<input type="text"/> %	Global Equity (previously Global Selector)	<input type="text"/> %	MyFolio Active V	<input type="text"/> %
Asia Pacific Equity (previously Pacific Basin Equity)	<input type="text"/> %	Global Inflation Linked Bond	<input type="text"/> %	MyFolio Market I	<input type="text"/> %
Cautious Managed	<input type="text"/> %	Global Real Estate	<input type="text"/> %	MyFolio Market II	<input type="text"/> %
China Equity	<input type="text"/> %	Global REIT	<input type="text"/> %	MyFolio Market III	<input type="text"/> %
Corporate Bond	<input type="text"/> %	Global Smaller Companies	<input type="text"/> %	MyFolio Market IV	<input type="text"/> %
Enhanced-Diversification Growth	<input type="text"/> %	India Equity	<input type="text"/> %	MyFolio Market V	<input type="text"/> %
Euro Global Liquidity	<input type="text"/> %	Japanese Equity	<input type="text"/> %	North American Equity	<input type="text"/> %
European Equity	<input type="text"/> %	Managed	<input type="text"/> %	Property	<input type="text"/> %
European Ethical Equity	<input type="text"/> %	MyFolio Active I	<input type="text"/> %	Total Return Credit	<input type="text"/> %
European Smaller Companies	<input type="text"/> %	MyFolio Active II	<input type="text"/> %	UK Equity	<input type="text"/> %
Fixed Interest	<input type="text"/> %	MyFolio Active III	<input type="text"/> %	UK Smaller Companies	<input type="text"/> %
Global Absolute Return Strategies (GARS)	<input type="text"/> %	MyFolio Active IV	<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

Direct property

- ☐ Tick this box if you are purchasing a property.
Please provide details of the property you wish to purchase by completing the **Property Information Questionnaire (SYPIQ)**.

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.

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 certified copies of one of each of the following:

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

- ☐ Tick this box if you want to deal or view your Stocktrade account online

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

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.

Stocktrade will use your email address given in Part 2 to set up your online account.

There are minimum investment amounts applied by the Deposit providers. Please see 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.

Policyowner
signature



Date

(DD/MM/YYYY)


Signature

Please speak to your financial adviser before completing this section.

To be completed by your financial adviser

- Email me at

- Name

to the standards set out in the anti-moneylaundering regulations, which will be forwarded to Standard Life on request*.

Financial adviser
signature

Date _____

(DD/MM/YYYY)

Financial adviser's name

Financial adviser's name

Please select your Flexible and clear pricing option (tick the appropriate box)

A ☐ B ☐ C ☐ D ☐ E ☐ F ☐ G ☐ H ☐

- 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

If you are taking FBRC, please choose payment frequency

Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly ☐

Initial (% of premium)

% (Max 5.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

Issue policy documents to ☐ Financial adviser ☐ Client

Stocktrade will use your email address to set up or add this client's policy to your online financial adviser account.

- * Enclose verification if Self-Directed Option of execution-only stockbroking chosen.

 Signature

For more information on Flexible and clear pricing, refer to Products from Standard Life for financial advisers (SYAPS).

For office use only

FPPC

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Part 7 - Your declaration

To be completed by policyowner
and, if applicable, trustees

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 in the Key Features document 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 understand that, depending on my tax residency status, movement of funds from this policy relating to transfer payments from a UK pension will be reported to HM Revenue & Customs.
9. I agree that the contract will be governed by Irish law.

Policyowner signature

(policyowner named
in Part 2)



Signature

Date

(DD/MM/YYYY)

We would like to contact you from time to time to keep you up to date with new products and services, company news and other promotions.

- ☐ No, I don't want to be kept informed by post
- ☐ No, I don't want to be kept informed by phone
- ☐ Yes, I want to be kept informed by email
- ☐ Yes, I want to be kept informed by text message (SMS)

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.

Trustees of pension scheme signatures



Signature

Date

(DD/MM/YYYY)

(01) 639 7000 www.standardlife.ie customerservice@standardlife.ie

Standard Life Assurance Limited is authorised by the Prudential Regulation Authority in the UK and is regulated by the Central Bank of Ireland for conduct of business rules. Standard Life Assurance Limited is registered in Dublin, Ireland (905495) at 90 St Stephen's Green, Dublin 2 and Edinburgh, Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH. Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.