

Before you complete this form

Please read your Illustration, Investment Options guide (SYI01) and Self-Directed Options guide (SYSD01), given to you by your financial adviser.

SYEP30 V26 0317

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 - Employer details

Company name

Company address
for correspondence

Employer's
accounting year end
(DD/MM/YYYY)

Contact
number

Company
registration number

Employer's tax
registration number

Part 3 - Member 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

Current annual
salary[^] €

Additional benefits* €

Normal
Retirement Age** (Must be age 60 - 70)

Date of joining company
(DD/MM/YYYY)

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

Spouse/civil partner's
date of birth (DD/MM/YYYY)

Personal Public
Service number

Marital status ☐ Single ☐ Married/Civil partnership ☐ Separated ☐ Divorced ☐ Widowed

Does the employee alone, or together with his or her spouse/civil
partner and/or minor children, directly or indirectly own or control
more than 20% of the voting rights of the employer?

☐ Yes ☐ No

Vesting provisions ☐ Immediate vesting ☐ Statutory vesting
(i.e. vesting after 2 years)

[^] You must submit a certified
copy of your P60 or recent
payslip to verify your salary.

* For example, benefit in kind,
bonus etc.

** For regular (monthly,
quarterly, half yearly)
contributions, there must
be at least one year between
your start date and
retirement age. For a term
of less than one year you
can only have a yearly
contribution or a single
contribution.

*** Minimum age is 18.

Regular contribution

Date of first regular contributions Renewal date^ (DD/MM)

Employer single contribution €

Member single AVC €

Payable by ☐ Cheque ☐ Bank Draft* ☐ Direct credit** ☐ Telegraphic transfer**

Your International
Bank Account
Number (IBAN)

Name on
your account

^ The renewal date is the date on which the annual review becomes effective.
For regular contributions choose a day between 1st-28th of the month.

The minimum contribution (employer and AVCs combined) is €175 each month, €525 each quarter, €1,050 each half-year, €2,100 each year. The minimum single contribution to set up a policy is €5,000. Employer contributions must be 'meaningful'.

If the member has any other retirement benefits, please give details

Please note that we'll be unable to proceed if Part 5 is incomplete.

If the member has more than 3 other retirement benefits, please copy this part and complete for each employment.

AVC = additional voluntary contribution

DC = defined contribution

DB = defined benefit

PRSA = personal retirement savings account

SSAS = small self-administered scheme

Part 6 - Your investment choice

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

Indicate how your total contributions as set out in Part 4 are to be allocated

Funds € and/or Self-Directed Options €

If you choose to invest in any of the Self-Directed Options, your investment will be initially placed in your policy's 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.

If you have more than one contribution type (for example a €10,000 single contribution, plus a monthly contribution of €250), and you have a different investment choice for each, please copy this section and complete it for each contribution.

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).

Deposits

Deposit provider	Deposit amount €	Deposit account term

There are minimum investment amounts applied by the Deposit providers. Please see www.standardlife.ie for the minimums that apply.

Self-Directed Options continued

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.

Your occupation

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.

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.

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.

Trustees
signatures



Date

(DD/MM/YYYY)


Signature

Please speak to your financial adviser before completing this section.

Part 7 - Source of wealth

Tell us how you acquired the money you are investing. Tick all that apply.

- | | | | |
|---|--|--|--|
| <input type="checkbox"/> Compensation payment | <input type="checkbox"/> Inheritance | <input type="checkbox"/> Salary/bonus | <input type="checkbox"/> Sale of company |
| <input type="checkbox"/> Divorce settlement | <input type="checkbox"/> Lottery/betting win | <input type="checkbox"/> Sale of investments | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Gift | <input type="checkbox"/> Policy claim/maturity | <input type="checkbox"/> Sale of property | |

Other

In certain circumstances, we may request further information.

Part 8 - Data Protection Notice

All personal information connected with your application will be collected, processed and maintained by Standard Life Assurance Limited, acting as a registered data controller in accordance with the Data Protection Acts (1988 and 2003). By submitting your application, you are consenting to the collection, use and sharing of your personal information by us for the purposes set out in this notice. If you provide information which relates to another person, you must explain to them why their information has been provided and how their personal information may be used. By signing the application, you are confirming that you have their consent, having given them an opportunity to read this notice.

Use of personal information

We may use your personal information to

- ▶ process your application
- ▶ set up, administer and manage your policy (including, but not limited to, underwriting, processing, servicing and claims handling)
- ▶ provide services relating to your policy and to work on improving our services to you (including insight, research, surveys and feedback)
- ▶ comply with all legal and regulatory requirements
- ▶ where you've given us permission, contact you from time to time to keep you up to date with new products and services, company news and other promotions.

If your application does not proceed or your policy ends, your information may be retained, used and shared in accordance with this notice, for as long as the law allows.

Sharing of personal information

Your personal information may be shared for the purposes above with

- ▶ other companies within Standard Life group
- ▶ your financial adviser
- ▶ third party service providers
- ▶ Revenue (who, under the Standard for Automatic Exchange of Financial Account Information in Tax Matters (Common Reporting Standard) may share information with the tax authorities of other countries)
- ▶ regulatory authorities
- ▶ auditors
- ▶ relevant industry bodies
- ▶ professional advisers
- ▶ others, where it is permitted by law, or where we have your consent

Where we share your information outside the European Economic Area, we take measures to ensure adequate controls are in place in order to protect it.

If you have appointed a financial adviser, we may share information about your policy with them to enable them to give you advice. Your financial adviser will hold, use and process your personal information in accordance with their data protection notice.

Sensitive personal information

If we collect sensitive personal information about you, (for example, information relating to physical or mental health), it will only be used to assess, administer or manage your application, policy or claim.

Right of access to personal information

You have the right to request a copy of the information we hold about you. To do so, you should submit a request in writing to our Data Protection Officer. We may charge a fee for providing it (the maximum fee is set by law). If your information is incorrect, we'll amend it.

We may make changes to this notice. If we do, we will update this notice on www.standardlife.ie

To be completed by your financial adviser

- Email me at

3. I have verified the identity and address of:

Member's name

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

Date _____

(DD/MM/YYYY)

Financial adviser's name

Financial adviser's name



Signature

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

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

If you are taking FBRC, please choose payment frequency

Monthly ☐Quarterly ☐Half-yearly ☐Yearly ☐

Initial (% of premium)

% (If Front: max 25.00%. If Level or age 65+ max 5.00%. If nil, insert 0%)

Renewal (% of premium)

% (If Front: max 2.00%. If Level: max 5.00%. If nil, insert 0%)

FBRC (% of fund)

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

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

Single contribution/transfer

Initial (% of premium)

	% (Max 5.00%. If nil, insert 0%)
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FBRC (% of fund)

	% (Max 1.00%. If nil, insert 0%)
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Issue policy to

☐ Financial adviser

Client

For office use only

FPPC

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Part 11 - Letter of exchange

Between ('The Employer')
and ('The Member')

Letter date and start date of plan (DD/MM/YYYY)*

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* This date must be the same date or earlier than the 1st regular contribution date in Part 4 on page 2.

Dear Member,

The Employer has agreed to establish, with effect from the date of this letter, an executive pension plan ('the Plan') with Standard Life to provide you ('the Member') with relevant pension benefits. The Plan (to be known as the

	Pension Plan)
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is established under irrevocable trusts as a retirement benefits scheme capable of approval by the Revenue as an exempt approved scheme under Part 30, Chapter 1, Taxes Consolidation Act 1997.

To the extent that persons are named as trustees below, the Employer hereby appoints those persons as trustees of the Plan and, as so testified by their signatures, those persons consent to act as trustees. To the extent that persons have not been named as trustees below, the Employer hereby agrees to act as the corporate and sole trustee of the Plan. The persons so named or the Employer as the case may be, shall hereinafter be referred to as 'the Trustees', which expression shall include the trustees for the time being of the Plan.

The power of appointing new trustees is vested in the Employer who may remove from office any trustee for the time being appointed. Except where a corporate trustee is sole trustee, the number of trustees shall not be less than two.

The Plan is governed by this letter, the application to which this letter is attached and the Standard Life Synergy Executive Pension Rules ('the Rules')(SYEPR), a copy of which will be issued to you along with the scheme documentation.

The Plan benefits will be provided by means of a contract or contracts with Standard Life, and the benefits payable will be subject to the terms and conditions of the contract or contracts and to the Rules.

Please acknowledge receipt of this letter by signing below and returning it to me.

Yours faithfully,

**Employer
signature**



--

Authorised
signatory name in
BLOCK CAPITALS

--

Position held

--


Signature

I acknowledge receipt of this letter.

**Member
signature**



--


Signature

If employer is **not** the corporate and sole trustee, the trustees are:

Trustee 1 name
Trustee 1 Address
Trustee 1 Signature
Trustee 2 Name
Trustee 2 Address
Trustee 2 Signature

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

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For office use only

Creditor Identifier: IE09ZZZ304935

Unique Mandate Reference
(your policy number)

SDDN V03 0216

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

International Bank
Account Number
(IBAN)

Type of payment: Recurrent

Accountholder signatures

Date _____

(DD/MM/YYYY)

Please return this mandate to Standard Life, 90 St Stephen's Green, Dublin 2.

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

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

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