

SYEP30 V35 0520

Before you complete this form

Please read your Illustration, Investment Options guide (SYI01) and Self-Directed Options guide (SYSDO1), given to you by your financial adviser.

If you choose Lane Clark & Peacock Trustee Services Limited as Trustee, you should also read the guide to Lane Clark & Peacock Trustee Services (LCP10). You must also complete your letter of their appointment (LCP30), and enclose it with this form.

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)

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 provide a copy of your most recent Employment Detail Summary (P60 replacement) or recent payslip to verify your salary from this employer.

* 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.

Part 4 - Pension contribution details

Regular contribution

Employer Member Additional Voluntary Contributions

Payable by Monthly direct debit Quarterly direct debit Half-yearly direct debit Yearly direct debit Yearly cheque

Date of first regular contributions (DD/MM/YYYY)

Single contribution

Employer single contribution Member single AVC

Payable by Cheque Bank Draft Direct credit*

Source of funds

Please give account details from where money was drawn

Your International Bank Account Number (IBAN)

Name on your account

* Please contact us on **(01) 639 7000** to pay by direct credit.

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'.

Cheque or bank draft must be drawn from employer's or member's account.

Part 5 - Other retirement benefits

Does the member have any other pension arrangements (including other pensions with Standard Life)? Yes No

If yes, please give details

	Pension 1	Pension 2	Pension 3
Sponsoring employer			
Normal retirement age			
Does this other pension relate to a previous, same or concurrent employment?	<input type="checkbox"/> Previous <input type="checkbox"/> Same <input type="checkbox"/> Concurrent	<input type="checkbox"/> Previous <input type="checkbox"/> Same <input type="checkbox"/> Concurrent	<input type="checkbox"/> Previous <input type="checkbox"/> Same <input type="checkbox"/> Concurrent
Scheme type	(i) <input type="checkbox"/> DC company scheme, AVC scheme, PRSA AVC, buy out bond or SSAS (ii) <input type="checkbox"/> Personal pension (RAC) or PRSA (iii) <input type="checkbox"/> DB company scheme	<input type="checkbox"/> DC company scheme, AVC scheme, PRSA AVC, buy out bond or SSAS <input type="checkbox"/> Personal pension (RAC) or PRSA <input type="checkbox"/> DB company scheme	<input type="checkbox"/> DC company scheme, AVC scheme, PRSA AVC, buy out bond or SSAS <input type="checkbox"/> Personal pension (RAC) or PRSA <input type="checkbox"/> DB company scheme
If (i), give current fund value	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
If (i) or (ii), give projected fund at normal retirement age	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
If (iii), give (a) date of leaving			
(b) pension at date of leaving	€ <input type="text"/> pa	€ <input type="text"/> pa	€ <input type="text"/> pa
(c) additional cash lump sum at date of leaving	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
(d) pension escalation	€ <input type="text"/> pa	€ <input type="text"/> pa	€ <input type="text"/> pa
(e) spouse/civil partner's benefit on death after retirement	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

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 (SYIO1)** 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 Standard Life funds

Absolute Return Global Bond Strategies (ARGBS)	<input type="text"/>	%	Global Inflation Linked Bond	<input type="text"/>	%	MyFolio Market IV	<input type="text"/>	%
Asia Pacific Equity	<input type="text"/>	%	Global Real Estate	<input type="text"/>	%	MyFolio Market V	<input type="text"/>	%
Cautious Managed	<input type="text"/>	%	Global REIT	<input type="text"/>	%	North American Equity	<input type="text"/>	%
China Equity	<input type="text"/>	%	Global Smaller Companies	<input type="text"/>	%	Property	<input type="text"/>	%
Corporate Bond	<input type="text"/>	%	India Equity	<input type="text"/>	%	Total Return Credit	<input type="text"/>	%
Diversified Income	<input type="text"/>	%	Japanese Equity	<input type="text"/>	%	UK Equity	<input type="text"/>	%
Enhanced-Diversification Growth	<input type="text"/>	%	Managed	<input type="text"/>	%	UK Smaller Companies	<input type="text"/>	%
Euro Global Liquidity	<input type="text"/>	%	MyFolio Active I	<input type="text"/>	%	Vanguard Emerging Market Stock Index	<input type="text"/>	%
European Equity	<input type="text"/>	%	MyFolio Active II	<input type="text"/>	%	Vanguard Euro Government Bond Index	<input type="text"/>	%
European Ethical Equity	<input type="text"/>	%	MyFolio Active III	<input type="text"/>	%	Vanguard Eurozone Stock Index	<input type="text"/>	%
European Smaller Companies	<input type="text"/>	%	MyFolio Active IV	<input type="text"/>	%	Vanguard Global Corporate Bond Index	<input type="text"/>	%
Fixed Interest	<input type="text"/>	%	MyFolio Active V	<input type="text"/>	%	Vanguard Global Stock Index	<input type="text"/>	%
Global Absolute Return Strategies (GARS)	<input type="text"/>	%	MyFolio Market I	<input type="text"/>	%	Vanguard US 500 Stock Index	<input type="text"/>	%
Global Equity	<input type="text"/>	%	MyFolio Market II	<input type="text"/>	%			
Global Equity Impact	<input type="text"/>	%	MyFolio Market III	<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.
- Tick this box if you want to set up a Stocktrade online account now to deal or view (Stocktrade account charges will apply)^
- Tick this box if you're an Irish national. If you're not, or you have dual nationality/citizenship, please give details

Member's nationality

National client identifier*

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

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.

^ Stocktrade will use your email address given in Part 2 to set up your online account. An additional charge applies for each deal arranged by post, email or fax.

* This could be your passport number or personal identity code, depending on country. For example, in UK, it's your National Insurance number. For other countries, see Execution-only stockbroking form (SYEOS1).

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.

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)

Member signature



Date

(DD/MM/YYYY)


Signature


Signature

Member's signature only required if you choose Lane Clark & Peacock Trustee Services as trustee.

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.

Politically exposed persons

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations.

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).

Role* in policy	Role holder's name	Role holder's relationship to PEP	PEP	Position held by the PEP
<i>For example, trustee</i>	<i>Anne Murphy-Smith</i>	<i>daughter-in-law</i>	<i>Hugo Smith</i>	<i>Director, UK Post Office</i>

*Trustee or member.

Part 8 - Data Protection Notice - Using your personal information

We will collect and use personal information about you such as your name, date of birth and address in order to provide this product or service and manage our relationship with you. It may be necessary as part of this product or service to collect and use personal information which is defined as 'sensitive' by data protection law. Any sensitive personal information will only be collected and used where it's needed to provide the product or service you have requested or to comply with our legal and regulatory obligations and where we have obtained your explicit consent to process such information.

To provide this product or service and meet our legal and regulatory obligations, we will keep your personal information and copies of records we create (for example, phone calls with us) while you are a customer of ours. Even when you no longer have a relationship with us, we are required to keep information for different legal and regulatory reasons. The length of time will vary and we regularly review our retention periods to make sure they comply with all laws and regulations.

The information collected may be shared with other parts of the Phoenix Group and other companies we work with to support us in the provision of the product or service you have with us. We may also share your information with our regulators (for example, the Central Bank of Ireland), the Revenue Commissioners, your financial adviser, and for applicable products and services, your employer where necessary and lawful to do so. Whenever we share your personal information, we will do so in line with our obligations to keep your information safe and secure.

The majority of your information is processed in Ireland. However, some of your information may be processed by us or the third parties we work with outside of the European Economic Area (EEA), including countries such as the UK and USA. Where your information is being processed outside of the EEA, we take additional steps to ensure that your information is protected to at least an equivalent level as would be applied by Irish data privacy laws, for example, we will put in place legal agreements with our third party suppliers and do regular checks to ensure they meet these obligations.

For more information on how we process your personal information and what your rights are, please read our Privacy Policy at www.standardlife.ie/privacy or write to the **Data Protection Officer, Standard Life, 90 St Stephen's Green, Dublin 2.**

We may make changes to this notice. If we do, we will update our Privacy Policy on www.standardlife.ie/privacy

Part 10 - Declaration

Please read carefully before signing.

WARNING: If you propose to enter into this executive pension contract in complete or partial replacement of any existing pension arrangement, please take special care to satisfy yourself that this executive pension contract meets your needs. In particular, please make sure that you are aware of the financial consequences of replacing your existing pension arrangement. Please take particular care if you are giving up any guarantees. If you are in doubt about this, please contact your financial adviser.

Member declaration

1. I have read the Data Protection Notice (Part 8) and I agree that my personal information may be used for the purposes described.
2. I declare that the information provided in this and other related forms (if any) are true and correct to the best of my knowledge and belief.
3. I agree that a copy of this application can be treated as the original for all purposes.
4. 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.

Employer and Trustees declaration

1. We have read the Data Protection Notice (Part 8) and we agree that our personal information may be used for the purposes described.
2. We agree that a copy of this application can be treated as the original for all purposes.
3. We declare that the information provided in this and other related forms (if any) are true and correct to the best of our knowledge and belief.
4. We agree that the contract will be governed by the Synergy Executive Pension Rules (SYEPR), Policy Schedule and Policy Provisions (SYEP60), together with this Application Form and any associated statements or questionnaires submitted in connection with this application.
5. We appoint Standard Life as the registered administrator of this executive pension. However, should we wish to appoint an alternative registered administrator, we will notify Standard Life in accordance with, and subject to the terms of any other agreement between Standard Life and the Trustees in respect of pension schemes governed by the Synergy Executive Pension Rules (SYEPR) and Policy Provisions (SYEP60).

Member
signature



Date

(DD/MM/YYYY)

Employer
signature



Date

(DD/MM/YYYY)

Trustees* of
pension scheme
signatures



Date

(DD/MM/YYYY)

Trustees' email

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 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 and policy provisions 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.

If there's outstanding information which prevents Revenue from approving this scheme within six months, we're required to return any contributions and transfer payments. The return of regular contributions won't include any investment growth or interest. The return of single contributions and transfer payments will include a deduction for any investment losses or interest charges.

To read our Privacy Policy, visit www.standardlife.ie/privacy


Signature


Signature


Signature

* As listed in letter of exchange on page 10. If employer is the sole trustee, they must sign here too.

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

Part 11 - Letter of exchange

Between
(‘The Employer’)

and
(‘The Member’)

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

* 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)

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 (which for this purpose may include a body corporate or bodies corporate) 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. Subject to the Rules of the Plan and any agreement with the Trustees, a trustee of the Plan may resign. If, on the effective date of the resignation of a trustee the number of trustees falls below the minimum number required, the Employer fails to appoint a successor in office to a retiring trustee, the Employer shall become a trustee of the Plan immediately on the effective date of the resignation of the trustee in question. Trustees shall do all such things necessary to effect their appointment or removal as the case may be.

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


Signature

Authorised signatory name in BLOCK CAPITALS

Position held

I acknowledge receipt of this letter.

Member signature


Signature

