

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.

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 copy of your last 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.

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

Single contribution

Employer single contribution Member single AVC

Payable by Cheque Bank Draft Direct credit* Telegraphic transfer*

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 or telegraphic transfer.

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	€	€	€
If (i) or (ii), give projected fund at normal retirement age	€	€	€
If (iii), give (a) date of leaving			
(b) pension at date of leaving	€ pa	€ pa	€ pa
(c) additional cash lump sum at date of leaving	€	€	€
(d) pension escalation	€ pa	€ pa	€ pa
(e) spouse/civil partner's benefit on death after retirement	%	%	%

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

Please speak to your financial adviser before signing this section.


Signature

Part 7 - Source of wealth

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

- Compensation payment Inheritance Salary/bonus Sale of company
- Divorce settlement Lottery/betting win Sale of investments Savings
- Gift Policy claim/maturity Sale of property

Other

In certain circumstances, we may request further information.

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 and European Economic Area (EEA). However, some of your information may be processed by us or the third parties we work with outside of the EEA, including countries such as the United States. 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 EEA 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 Standard Life International dac or Standard Life Assurance Limited (Irish branch) 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 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)

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



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Authorised signatory name in BLOCK CAPITALS

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Position held

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Signature

I acknowledge receipt of this letter.

Member signature



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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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SDDN V03 0216

For office use only	
Creditor Identifier: IE09ZZZ304935	
Unique Mandate Reference (your policy number)	<input type="text"/>

Direct debit instruction	
<p>By signing this mandate form, you authorise</p> <p>(a) Standard Life to send instructions to your bank to debit your account, and</p> <p>(b) Your bank to debit your account in accordance with the instruction from Standard Life.</p> <p>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.</p>	
Name on account	<input type="text"/>
Address on account	<input type="text"/>
International Bank Account Number (IBAN)	<input type="text"/>
Type of payment:	Recurrent
Accountholder signatures	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
<p>Please return this mandate to Standard Life, 90 St Stephen's Green, Dublin 2.</p>	

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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