

SYPP30 V45 0821

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.

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

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

* Minimum age is 18.

Please complete the checklist after Part 9 - Your declaration.

Part 3 - Your eligibility, occupation and retirement details

1. Are you self employed or a partner personally acting in some trade, profession or occupation which gives rise to relevant income? Yes No
2. Are you an employed person in an occupation that is non-pensionable? Yes No

If no to 1 and 2, please consult your financial adviser who will need to check your eligibility.

Your occupation

I want to retire under my Synergy Personal Pension at age (60 - 75)*

* 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, a single contribution or transfer payment.

Part 4 - Your contributions

Regular contribution**

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

Payable by

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

Single contribution or transfer payment***

Payable by

 Cheque Bank Draft Direct credit^

^You should make your direct credit payment to Standard Life International, IBAN: IE51 ULSB 985010 05292222, quoting reference: your surname, first name, and date of birth (dd/mm/yyyy)

Source of funds

Please give account details from where money was drawn

Your International

Bank Account

Number (IBAN)

Name on

your account

Do you require a 'willing and able' letter to be sent to the transfer provider?

 Yes No

** The minimum contribution is €175 each month, €525 each quarter, €1,050 each half-year, €2,100 each year.

*** The minimum single contribution or transfer payment to set up a policy is €5,000.

Part 5 - Anti-money laundering requirements

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.

If you don't provide suitable anti-money laundering/identification documents/information to us, we may be required to stop processing and discontinue doing business with you. Similarly, after the policy is written, if we ask for up to date verification, we may not be allowed to carry out your instructions until it is provided.

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 the 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
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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) please make a copy of this section 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 40	<input type="text"/> %	MyFolio Market II	<input type="text"/> %
Asia Pacific Equity	<input type="text"/> %	Global Index Fund 60	<input type="text"/> %	MyFolio Market III	<input type="text"/> %
Cautious Managed	<input type="text"/> %	Global Index Fund 80	<input type="text"/> %	MyFolio Market IV	<input type="text"/> %
China Equity	<input type="text"/> %	Global Index Fund 100	<input type="text"/> %	MyFolio Market V	<input type="text"/> %
Corporate Bond	<input type="text"/> %	Global Inflation Linked Bond	<input type="text"/> %	North American Equity	<input type="text"/> %
Diversified Income	<input type="text"/> %	Global Real Estate	<input type="text"/> %	Property	<input type="text"/> %
Dynamic Multi-Asset Growth	<input type="text"/> %	Global REIT	<input type="text"/> %	Total Return Credit	<input type="text"/> %
Euro Global Liquidity	<input type="text"/> %	Global Smaller Companies	<input type="text"/> %	UK Equity	<input type="text"/> %
European Equity	<input type="text"/> %	Japanese Equity	<input type="text"/> %	UK Smaller Companies	<input type="text"/> %
European Ethical Equity	<input type="text"/> %	Managed	<input type="text"/> %	Vanguard Emerging Market Stock Index	<input type="text"/> %
European Smaller Companies	<input type="text"/> %	Multi-Asset ESG	<input type="text"/> %	Vanguard Euro Government Bond Index	<input type="text"/> %
Fixed Interest	<input type="text"/> %	MyFolio Active I	<input type="text"/> %	Vanguard Eurozone Stock Index	<input type="text"/> %
Global Absolute Return Strategies (GARS)	<input type="text"/> %	MyFolio Active II	<input type="text"/> %	Vanguard Global Bond Index	<input type="text"/> %
Global Corporate Bond SRI	<input type="text"/> %	MyFolio Active III	<input type="text"/> %	Vanguard Global Corporate Bond Index	<input type="text"/> %
Global Equity	<input type="text"/> %	MyFolio Active IV	<input type="text"/> %	Vanguard Global Stock Index	<input type="text"/> %
Global Equity Impact	<input type="text"/> %	MyFolio Active V	<input type="text"/> %	Vanguard US 500 Stock Index	<input type="text"/> %
Global Index Fund 20	<input type="text"/> %	MyFolio Market I	<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

Deposits

Deposit provider	Deposit amount €	Deposit account term

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

Nationality

National client identifier*

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 copies of one of each of the following:

- Proof of identity, for example **and** Proof of address, for example
- Current passport
 - Current EU or UK driving licence
 - 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.

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

^ 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.

Policyowner
signature



Date

(DD/MM/YYYY)

Please speak to your financial adviser before completing this section.



Signature

Part 8 - Your financial adviser's declaration

To be completed by the financial adviser

- I confirm that in accordance with Regulation 6(1) of the Life Assurance (Provision of Information) Regulations, 2001, my client has been given in writing the information specified in Schedule 1 of those Regulations, and that
- I have advised my client as to the financial consequences of replacing an existing policy with this policy by cancellation or reduction, and of possible financial losses as a result of such replacement.
- I have explored the available investment options with my client and taking into account their circumstances, long term needs, age, attitude to risk, and product suitability, I am satisfied that this policy is suitable for them.
- I confirm that I will retain the appropriate evidence regarding any instructions I give to Standard Life or any third party providers on behalf of my client.
- I want to be able to view my client's Stocktrade account online.

Email me at

- I have completed all checks to verify the identity, address, source of funds, and source of wealth of:

Name

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

Commission details

For regular contributions, please make 4 choices:

(i) Pricing option, (ii) Initial, (iii) Renewal and (iv) FBRC

For single contribution/transfer, please make 3 choices:

(i) Pricing option, (v) Initial and (vi) FBRC

(i) Pricing option

A B C D E F G H

I For term to NRA \geq 1 and $<$ 5 complete years J For term to NRA \geq 1 and $<$ 5 complete years K For term to NRA $<$ 1 complete 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%)

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.

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

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

(iv) Regular FBRC (% of fund)

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

(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

Issue policy to Financial adviser Client

Financial adviser 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

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

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


Signature

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 which is in the Key Features document 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.

Policyowner
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
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

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

(01) 639 7000 www.standardlife.ie 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

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Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.

SDDN V05 0821

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 D02 F653.</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, visit the Customer Assist section of the Banking & Payments Federation Ireland website, www.bpfi.ie

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

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Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.

Direct debit instruction