

active money personal pension application form

For transfer, single or regular payments



AMPP30 0710

Who this form is for

You should use this form to take out an active money personal pension (AMPP) with us for the first time, or if you wish to make additional transfer payments or set up a regular payment to an existing plan. Both you and your financial adviser are required to complete this form. Your financial adviser will advise you on whether you are eligible for this contract and what options are most suitable for you.

Filling in this form

If you are receiving advice from a financial adviser you should remember that the financial adviser is acting on your behalf not only by giving you advice, but also regarding the completion of this form.

By filling in this form you are applying to enter into a contract with Standard Life. This application will be the basis of the contract if we accept your application. We will provide you with a copy of this form and the terms and conditions of the contract on request.

Until your application has been accepted by us, Standard Life's liability is limited to a return of the payments you have made.

'Contracted-out' benefits can be transferred into the Standard Life AMPP. These are Protected Rights (PR), Guaranteed Minimum Pension (GMP) or Section 9(2B) Rights built up in another pension scheme or policy.

Please use black ink and BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to fix a mistake, please initial any changes you make.

When we say 'Standard Life' we mean 'Standard Life Assurance Limited'.

Part 1a – Planholder's details

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Male

Female

Surname

First Name(s) in full

National Insurance Number

Date of birth (DD/MM/YYYY)

The information supplied will be held in the strictest confidence and subject to the provisions of Data Protection legislation.

Marital status Single

Married/civil partnership

Separated

Address

Divorced/dissolved civil partnership

Widowed/surviving civil partner

(House number)

Street

City/Town

County

Postcode

Please note that we cannot process your application form without a valid National Insurance Number (you can normally find this on your payslip).

You only need to complete this part if you wish to transfer benefits from another pension scheme or policy.

If you are transferring more than two plans, please photocopy pages 3, 14 and 15 for each additional plan and when complete, sign and date page 15 and attach all the pages to this form. Please repeat this process for each transfer you make. You should allow at least 6 months for any transfer payment(s) to be received by Standard Life.

Transfer payments can be made by BACS, cheque or telegraphic transfer.

Your 'reference number or policy number' is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

Where protected rights are being transferred, you must transfer the full value of your protected rights.

A block transfer is an option where at least 2 members transfer their benefits from one scheme to another. (Not all members of the scheme must transfer). Both the ceding and new scheme must be the same for both members and the transfer should be made as one payment to the new scheme. This protects the members' rights to a tax-free lump sum over 25% or an early retirement age.

This protection applies to one block transfer only.

Please call **0845 278 5626** for any questions on block transfers. Call charges may vary and calls may be recorded and/or monitored to help improve customer service.

Part 2 – Details of the plan(s) from which you are transferring

Transfer payment 1

Transferring scheme name

Contact name

Name and address of the administrator of the transferring scheme

Address
 (building number) Street

City/Town

County

Postcode Telephone number

Your reference number or policy number

1. What is the estimated total value of this payment? £
 How much of your benefits under the transferring scheme does this represent? All Some

Please provide a split of this transfer payment as follows:

Ordinary Benefits
 a) Value of the ordinary (non contracted-out) benefits. £

Contracted-out benefits
 b) Total value of the contracted-out benefits. £

c) Cash value of Protected Rights in respect of employment before 6 April 1997/Guaranteed Minimum Pension. £

d) Cash value of Protected Rights in respect of employment after 5 April 1997/Section 9(2B) Rights. £

2. Is the scheme or plan you are transferring from an occupational pension scheme? Yes No

3. Is this transfer payment part of a block transfer? Yes No

4. Does any part of the transfer payment relate to pension benefits from your ex-spouse/ex-civil partner on divorce/dissolution of a civil partnership? If 'Yes', go to question 5. If 'No', go to Part 3. Yes No

5. Was any part of your ex-spouse's/ex-civil partner's pension already in payment at the time of the divorce/dissolution of the civil partnership? If 'Yes', we'll ask the transferring scheme to confirm what proportion of the transferred funds this applies to. Yes No

Part 2 – Details of the plan(s) from which you are transferring (continued)

Transfer payment 2

Transferring scheme name

Contact name

Name and address of the administrator of the transferring scheme

Address

(building number) Street

City/Town

County

Postcode

Telephone number

Your reference number or policy number

Transfer payments can be made by BACS, cheque or telegraphic transfer.

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Part 3 – Payments – which parts to complete

Part 3a – Details of your regular or single payments

Complete this part if you are making regular or single payments.

Part 3b – Source of wealth and occupation details

Complete this part at all times.

Part 3c – Employer’s details

Complete this part if your employer is making payments to your plan.

Part 3d – Details of your employer’s payments

Complete this part if your employer is making payments to your plan (including salary sacrifice payments).

Part 3e – Making payments through your employer

Complete this part if you are making payments through your employer by salary deduction.

Part 3a – Details of your regular or single payments

Complete this part if you are making regular or single payments.

If you ‘recycle’ a tax-free lump sum you may face a tax charge. Leaflet GEN449 – ‘Recycling of lump sums’ explains what recycling means and what the tax consequences are.

With effect from 6 April 2011, some higher-rate taxpayers may stop being eligible to receive extra tax relief. They may also suffer a tax penalty if they try to increase the payments they make to their pension plans before this date. For further information, please read our fact sheet ‘Tax changes to pension plans announced in 2009 budget’ (GEN658), or speak to your financial adviser.

The minimum payment you can make to set up the plan is £150 a month, £1,500 a year or a single payment of £1,000. (All figures shown are gross.) If you or your employer choose to have automatic yearly increases, then these increases apply to ALL regular payments.

Regular payments

1. Please state the regular **GROSS** amount you wish to pay into your plan. This should match the amount you complete in question 1 of Part 3e if you are making payment through your employer. £

2. How often do you want to make the payments stated above? Monthly Yearly

- You must make regular payments by Direct Debit.
- Regular monthly payments must be due on the same date each month. Regular yearly payments must be due on the same date and month each year.
- The amount you pay will be less than the gross amount you have agreed to pay. This is because we reclaim basic-rate tax on your behalf. If you pay tax at the higher rate, you can claim the rest of the relief through your tax return.
- You can make occasional payments at any time. You can stop, restart, increase, decrease or suspend your payment at any time. You will not be charged for this.

3. Please choose a date for your first regular payment between the 1st and 28th of the month. Date (DD/MM/YYYY)

Single payments

4. If making a single payment please state the **GROSS** amount. £

The amount we take from your bank account will be less than the gross amount. The gross amount includes basic-rate tax relief, which we’ll add automatically to your payments and reclaim from HM Revenue & Customs.

The first payment date must be a date after you have signed the application form.

Single payments can be made by cheque, and made payable to ‘Standard Life Assurance Limited’. Please call us on **0845 278 5626** (call charges may vary) if you would like to pay us directly from your bank account.

Part 3b – Source of wealth and occupation details

Complete this part at all times.

Due to Financial Services Authority (FSA), requirements we are required to obtain information about the source of your payment before we can accept your application. Please indicate below how you acquired the money you are investing.

Salary/Bonus <input type="checkbox"/>	Divorce Settlement <input type="checkbox"/>	Gift <input type="checkbox"/>
Inheritance <input type="checkbox"/>	Lottery/Betting win <input type="checkbox"/>	Policy claim/Maturity <input type="checkbox"/>
Compensation payment <input type="checkbox"/>	Sale of Investments <input type="checkbox"/>	Sale of property <input type="checkbox"/>
Sale of company <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>

If other, please specify

Occupation

What is your Gross Annual Income? Please indicate which income band applies to you.

Under £10,000 <input type="checkbox"/>	£10,000 to £14,999 <input type="checkbox"/>	£15,000 to £19,999 <input type="checkbox"/>	£20,000 to £24,999 <input type="checkbox"/>
£25,000 to £29,999 <input type="checkbox"/>	£30,000 to £39,999 <input type="checkbox"/>	£40,000 to £49,999 <input type="checkbox"/>	£50,000 or more <input type="checkbox"/>

Part 3c – Employer’s details

Complete this part if your employer is making payments to your plan.

Employer’s name

Employer’s address
(Building number) Street

City/Town

County

Postcode

Contribution controls legislation will apply to all your employer’s payments. This means that Standard Life must make a report to the Pensions Regulator if payments are not made. Any payments made in respect of one month must be received by the 19th of the following month.

The legal requirements on employers who are subject to contribution controls legislation mean that Direct Debit can only be used as a payment method if we receive payments at the same frequency as you are paid.

Salary sacrifice is the process of giving up part of your normal salary in return for an employer payment to your pension plan.

Part 3d – Details of your employer’s payments

Complete this part if your employer is making payments to your plan (including salary sacrifice payments).

Regular payments

- Please state the regular **GROSS** amount your employer wants to pay into your plan. £
- How often will your employer make the payments stated above? Monthly Yearly
- Please choose a date for your employer’s first regular payment between the 1st and 28th of the month. Date (DD/MM/YYYY)

Single payments

- If your employer wants to make a single payment please state the **GROSS** amount. £

Part 3e – Making payments through your employer

Complete this part if you are making payments through your employer by salary deduction.

Salary deduction is where your own net payments are deducted from your salary and passed to Standard Life by your employer. This removes the need for a direct debit instruction on your personal account.

We need to be able to tell when each regular payment is deducted from your salary. For example, for a regular payment due to be paid to Standard Life in January, please advise the date(s) payments will be deducted from your salary.

1. State the total (gross) amount of any payments. £
2. How often will your employer make the payments? Monthly Yearly Single
3. Please choose a date for your first regular payment between the 1st and 28th of the month. (DD/MM/YYYY)
4. Which date will your employer start deducting payments? (DD/MM/YYYY)
5. How often will payments be deducted? Weekly Monthly Yearly Other
6. If 'Weekly' which day of the week will they be deducted on.
7. If 'Monthly' which date (between 1st and 28th).
8. If 'Other', please give details.

You can only choose this option if you are paying by Direct Debit.

If the index of national average earnings stays the same or goes down, the regular payments will stay the same.

Part 3f – Automatic yearly increases

- Only complete this part if you wish any regular payments (including existing ones) to increase automatically each year.
- We will automatically apply the increases on the anniversary of the first payment date, unless you specify otherwise. If the date you choose falls within 3 months of the date we set up your plan, we will not increase your payments until your chosen date in the following year.

1. Do you wish all payments to increase in line with National Average Earnings? Yes No

If 'No' go to question 2. If 'Yes' go to question 3.

2. Choose a percentage between 1% and 10% of your previous year's payments. %
3. When do you want the first automatic increase to occur? (DD/MM)

If you are self-employed, any payments made from the partnership account should be reimbursed, as applicable.

Part 3g – Direct Debit Instruction

Where there is more than one payer making a regular payment (eg employer and employee), a separate Direct Debit Instruction is required. Please photocopy this page as necessary.

Completion of your Direct Debit Instruction

1. Complete this form to instruct your Bank/Building Society to make payments directly from your account.
2. If the due date falls on a weekend or Bank Holiday, your account will be debited within two working days.
3. Please ensure that the Instruction is signed and dated and the Direct Debit Guarantee is detached before the Instruction is returned to Standard Life.

Instruction to your Bank or Building Society to pay by Direct Debit



ORIGINATOR'S IDENTIFICATION No.

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Issued by: Standard Life, Standard Life House,
30 Lothian Road, Edinburgh EH1 2DH

FOR STANDARD LIFE OFFICIAL USE ONLY
This is not part of the Instruction to your Bank or Building Society.

Name and full postal address of your Bank or Building Society branch.

Postcode

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Name(s) of Account holder(s)

Bank or Building Society Account No.

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Branch Sort Code – Please refer to the top right hand corner of your cheque book.

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Reference Number

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Your Instruction to the Bank/Building Society, and Signature

- Please pay Standard Life Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Standard Life and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

Date (DD/MM/YYYY)

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Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

If making a single payment, please write the cheque for the amount you wish to pay, less basic-rate tax (ie net of tax). Please call us on **0845 278 5626** (call charges may vary) if you would like to pay us directly from your bank account.

Part 3h – Details for single payments

Cheques must be for the **NET** amount (employer's for the **GROSS** amount) and made payable to 'Standard Life Assurance Limited'. Remember to enclose the cheque with this application form. You can also pay us directly from your bank account.

Until we accept your application, our liability is limited to a return of the payments you have made.

Part 4 – Where would you like to invest your transfer, single and regular payments?

Please ensure that the total percentage adds up to 100% or the amounts you enter add up to the total payment.
 Unless you instruct us otherwise, we will invest all your payments in the percentages or amounts shown below. If there are not enough funds to carry out your instructions, we will contact your financial adviser.

Pension funds

IMPORTANT:
 Please note that the **fund code(s)** and the **FULL fund name(s)** must be included on this form, as shown in the example opposite, in order for us to process your application. If we do not have this information we may have to return your application.
 Please note: if you choose a Lifestyle profile you can only combine this with the Trustee Cash Account. You can't invest in any other funds. You must also choose the age at which you wish to start taking your benefits, as this affects how the profile works. We ask for this in Part 1a, on page 2.
 For further information on the investments available to you, please refer to 'AMPP Fund choices and charges guide' (AMPP5a)

Fund code		Fund names	Regular Payments £ or %	Transfer/Single Payments £ or %
		No more than 12 funds can be selected, 11 if you also want to invest in the Trustee Cash Account.		
G	6	EXAMPLE 'Standard Life 2010 FTSE Tracker Pension Fund'		
Total £ or % invested in the Trustee Cash Account			100%	100%

Part 5 – Instruction for payment of death benefits

You can complete an 'Instruction for payment of death benefits' form (PPP36) to tell us who you would like your death benefits paid out to if you die before buying an annuity.

Part 6 – Financial Adviser details

This part should be completed by your financial adviser.

Contact name

Telephone number

Business writer name(s)

Agency name

Mobile Number

Agency code

email address

Intermediary reference number

The company stamp box must be stamped.

Part 6b – Sales advice details

This part should be completed by your financial adviser.

Basis of sale Whole of market Other

Company stamp

If 'Other', please specify

Please confirm that advice has been given Yes No

By completing this part, you are confirming that you are taking responsibility for submitting this piece of business for your client. (Please note that we will return any form containing pension transfer business if you do not complete this part.)

Part 7 – Commission for your financial adviser

Complete this part to tell us how you wish to pay your financial adviser. If your financial adviser is not taking commission please go to Part 7d.

Part 7a – Commission for your financial adviser for regular payments

Please tell us what commission you wish us to pay to your financial adviser for any regular payments you wish to make:

Initial Commission for regular payments

A charge, equal to the commission, taken from your plan in 12 to 48 monthly instalments. This period must not go past the age (see Part 1a) you have told us that you wish to start taking your benefits on. This charge will continue to be taken even if regular payments stop in the first year.

Commission Type
Level Commission

Regular Payment

Max 5% (in steps of 0.1%, paid for by a regular charge taken from your plan for each payment received). **A**

You can enter an amount or a percentage in boxes A and B. However, you cannot enter a mix of percentages and amounts. Important: A plus a 1/10th of B cannot exceed 5%.

Initial Commission

Max 25% of first year's expected regular payments. **B**

Please tell us over what period you wish to pay for the Initial Commission. This must be between 12 and 48 months.

months

Fund Based Renewal Commission

Max 1.5% (steps of 0.01%, paid for by a regular charge taken from your plan) %

Frequency

Yearly Monthly

Part 7b – Commission for your financial adviser for transfer or single payments

Please tell us what commission you wish us to pay to your financial adviser for any transfer or single payment you wish to make:

Funded Initial Commission is not available if you are age 69 or over. If Funded Initial Commission is selected and you buy an annuity or take a transfer payment within 6 years, a transfer charge will apply.

Commission Type

Transfer Payment

Single Payment

Funded Initial Commission

Max 5% (in steps of 0.1%, paid for by a monthly charge taken from your plan for 6 years) **A**

A

Initial Commission

Max 8% (in steps of 0.1%, paid for by a one-off charge taken from your plan) **B**

B

You can enter an amount or a percentage in boxes A and B. However, you cannot enter a mix of percentages and amounts. The combined total for A and B for any payments cannot exceed 8% of the payment.

Fund Based Renewal Commission

Max 1.5% (steps of 0.01%, paid for by a regular charge taken from your plan) %

Frequency

Yearly Monthly

Part 8 – Data Protection Notice – Important, please read

All parties named on this form have a right to know that Standard Life holds personal data about them and for what purpose it will be used for. Please give them an opportunity to read this notice.

We will collect personal information about you in order to consider your application and, if your application is successful, to provide our services to you and manage our relationship and Standard Life's business and services. If your application does not proceed, the information will be held on our records for up to 7 years before it is deleted. We may disclose the information collected to your professional advisers, to other Standard Life group companies, to our third party service providers and, where we consider it appropriate and lawful to do so, to other organisations.

Your information may be held or disclosed in countries outside the European Economic Area which may not have the same standard of data protection laws. Where this occurs, we will take appropriate steps to adequately protect it. If you are an employee and your employer is making payments to your plan, we may disclose information to them about the payments they have made.

We may, in future, be able to send you a yearly statement that shows both information about your state pension and the benefits you may get from this plan. To be able to do this, we would have to share the information set out in Part 1a of this form with the Department for Work and Pensions (DWP). We would not use this information for any other purpose.

If you want us to share this information with the DWP, you need take no action.

If you do not want us to share this information with the DWP, please tick this box.

If you do not tick the box, you will have 30 days from the date you sign this form to change your mind before we may share information about you with the DWP. We may share information each year, as long as you are a member of this plan. If you decide later on that you do not want us to share this information with the DWP you can contact us as detailed in the "How to contact us" section of the Key Features Document.

We and the other subsidiaries of Standard Life plc would like to contact you from time to time to keep you up to date with special offers, new products and services, newsletters and other promotions. We will never pass your details to companies that are not subsidiaries of Standard Life plc for marketing purposes.

If you do not want to be kept informed, please tick this box.

If you would like to request a copy of the personal data we hold about you, please write to the Data Protection Co-ordinator at our Head Office. We may charge a fee for providing the information.

Part 9 – Money laundering regulations

To comply with Money Laundering Regulations, we may verify your identity by carrying out an online check with a reference agency. Where an online check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties.

If the online check does not confirm your identity, we will carry out a manual check.

You only need to complete this section if you are the legal guardian of the person named in Part 1a.

Part 10 – Declaration – by legal guardian

- I understand that the payments made to this Scheme in respect of the person named in Part 1a will only be returned to them in the form of benefits payable under the rules of the Scheme. In particular I understand that no benefits will be returned to them before age 55 unless the person is incapacitated.
- I also understand that until the person reaches age 16, I am responsible for ensuring that the payment limits set by HM Revenue & Customs are not exceeded.

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Male Female

Surname

First Name(s) in full

Address

(House number)

Street

City/Town

County

Postcode

How long have you been at this address

years and months

Date of birth (DD/MM/YYYY)

Telephone (include area dialling code)

Home

Work

Mobile

Signature

Date (DD/MM/YYYY)

You must also sign Part 13 on page 15.

Part 11 – Declarations – Important, please read

Important information

HM Revenue & Customs warning

This application will also be used as an application for tax relief at source. If you give false information you may be prosecuted.

Declaration by Standard Life

If Standard Life Assurance Limited accepts this application, it hereby agrees as administrator and provider in terms of the rules of the Standard Life Self Invested Personal Pension Scheme to administer the Scheme as required by the rules.

Your declaration

1. I, the person named in Part 1a of this application, request that the benefits described in or arising from payments specified in the application be provided for me under the Standard Life Self Invested Personal Pension Scheme, and in consideration of its acceptance I undertake to be bound in all respects by the rules of the Scheme in force from time to time.
2. I declare that to the best of my knowledge and belief, the statements made in this application, whether in my handwriting or not, are correct and complete.
3. I agree to be bound by the AMPP Terms and Conditions.
4. I agree to my financial adviser receiving the commission and/or fees described in Parts 7a, 7b and 7d.
5. I have read and understood the Data Protection Notice. I agree that my personal data (including any sensitive data) may be used for the purposes described, (subject to me exercising my right not to be contacted with details of other products and services).

If I am applying to make regular or single payments

6. I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004, will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year. (The 'basic amount' for the 2010-2011 tax year is £3,600 gross. This may change in future tax years.)
7. I declare that I will tell Standard Life if an event occurs (such as those listed in my Key Features Document) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the event occurs, or within 30 days of the event if this is later.

My declarations to the administrator(s) of the transferring scheme(s) named in Part 2

8. I authorise and instruct you to transfer funds from the plan(s) as listed in Part 2 directly to Standard Life. Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer(s) listed in Part 2 of this application.
9. I authorise you to release all necessary information to Standard Life to enable the transfer of funds to Standard Life.
10. I authorise you to obtain from and release to the financial adviser named in this application any additional information that may be required to enable the transfer of funds.
11. If an employer is paying contributions to any of the plans as listed in Part 2, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).
12. Until this application is accepted and complete, Standard Life's responsibility is limited to the return of the total payment(s) to the administrator of the transferring scheme.
13. Where the payment(s) made to Standard Life represent(s) all of the funds under the plan(s) listed in Part 2, then payment made as requested will discharge the administrator of the transferring scheme of all claims and responsibilities in respect of the plan(s) listed.
14. Where the payment(s) made to Standard Life represent(s) part of the funds under the plan(s) listed in Part 2, then the administrator of the transferring scheme will be discharged of all claims and responsibilities only in respect of the part of the plan(s) represented by the payment(s).

My declarations to Standard Life Assurance Limited & the administrator(s) of the transferring scheme(s)

15. I promise to accept responsibility in respect of any claims, losses and expenses that Standard Life and the administrator of the transferring scheme may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.
16. I confirm that, where I am transferring Protected Rights, I wish to transfer these from the administrator of the transferring scheme to Standard Life.

Part 12 – Authorising your financial adviser to give investment instructions and/or to provide information about the Lifetime Allowance on your behalf

- 1. I authorise Standard Life to accept instructions from the financial adviser named in Part 6 to buy or sell investments under my plan. This authorisation will apply until Standard Life receives a written instruction from me changing or withdrawing my Authorisation. Yes No
- 2. I authorise Standard Life to accept information provided from the financial adviser named in Part 6 regarding the amount of Lifetime Allowance I have used up and the value of retirement benefits I have already taken or I am about to take from other pension schemes or policies. Yes No

Signature Date (DD/MM/YYYY)

Part 13 – Reminders and your signature

Before signing this form, tick the box to show you:

- 1. Have enclosed other application forms, if applicable
- 2. Have completed all the appropriate Parts.
- 3. Have read through all the declarations.

It is a serious offence to give false statements. The penalties are severe and could lead to prosecution. You must tell us all 'material' facts. These are facts that affect whether or not we can accept your application. You must tell us if any information changes before your plan starts. If you don't or you fail to tell us any other relevant information, it may make your plan void.

Please now sign the form. Your financial adviser will complete the money laundering section.

Signature Date (DD/MM/YYYY)

Money laundering section – for financial adviser use only.

Part i – Money laundering regulations

To comply with the Money Laundering Regulations of Parts ii and iii must be completed by your financial adviser.

Part ii – Identity of applicant verified

I/We confirm that:

- The information in Part 1a was obtained by me/us in relation to the customer and;
- The evidence I/we have obtained to verify the identity of the customer exceeds the standard evidence set out within the guidance for the UK Financial Sector issued by JMLSG. Please place cross in box.

Please now complete Part iii.

Part iii – Financial adviser’s details

If Part ii has been completed this section must be signed by the person who has seen the original documentary evidence.

Name of Regulator

Company Stamp

FSA or authorisation number

Signed

Name

Position

Date (DD/MM/YYYY)

The company stamp box must be stamped.

Standard Life use only

Account Manager

Sales Team Code

Consultant code

To comply with money laundering regulations you need to send the completed form ‘Confirmation of verification of identity – private individual’ with this application.

Standard Life
AMPP Customer Centre
FREEPOST SCO5950
1 Exchange Crescent
Edinburgh
EH3 8YZ

Standard Life Assurance Limited*, registered in Scotland (SC286833), Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH is the Provider and Scheme Administrator of the Standard Life Self Invested Personal Pension Scheme. Standard Life Trustee Company Limited, registered in Scotland (SC076046), also Standard Life House, is the Trustee. Telephone (0131) 225 2552. *Calls may be recorded/monitored.* www.standardlife.co.uk

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- If the amounts to be paid or the payment dates change Standard Life will notify you 5 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Standard Life or your Bank/Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time, by writing to your Bank or Building Society. Please also send a copy of your letter to us.