



## How to contact us

 **0845 084 5000**

Monday to Friday 9am to 5pm  
(you'll need your plan number  
when you call us)

[www.standardlife.co.uk/online](http://www.standardlife.co.uk/online)

## SIPP and PFWP

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SIPP number: D

PFWP number: D

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### Authorisation form

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#### Applying online

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I, (CLIENT NAME & ADDRESS):

authorise my adviser (ADVISER NAME):

to apply online on my behalf for a Self Invested Personal Pension (SIPP) and a Pension Fund Withdrawal Plan (PFWP) from Standard Life Assurance Limited ('Standard Life').

I understand that Standard Life will send me a confirmation schedule containing all the information and declarations provided by my adviser on my behalf.

I understand that it's my responsibility to check that all the information given in the confirmation schedule is correct, in particular the level of commission and/or fees that I have agreed to pay to my adviser. I will contact Standard Life immediately if there are any errors or omissions.

#### Transfer Payments

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I instruct the administrator of each scheme, or insurer of each plan, named in this form to transfer the funds held for me in that scheme or plan to Standard Life. I also authorise them to release all information to Standard Life that Standard Life needs in order to process the transfer.

I understand that Standard Life will apply any contracted-out benefits in a transfer payment that I have received from my ex-spouse/civil partner on divorce/dissolution of a civil partnership to a Pension Fund Withdrawal Plan and the rest to a Self Invested Personal Pension.

Once a transfer payment is received by Standard Life, I discharge the transferring scheme or insurer of all liabilities in respect of the funds that are transferred.

**Pensions**

**Mortgages**

**Savings**

**Investments**

**Healthcare**

**Insurance**

Products provided by subsidiaries of Standard Life plc or other specified providers.

Standard Life Assurance Limited, registered in Scotland (SC286833), Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH, authorised and regulated by the Financial Services Authority. 0131 225 2552. *Calls may be recorded/monitored.* [www.standardlife.co.uk](http://www.standardlife.co.uk)

SIPP number: D  
PFWP number: D

**Transfer payment details - 1**

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|                          |  |  |
|--------------------------|--|--|
| Administrator name       | <input type="text"/>                               |  |
| Transferring scheme name | <input type="text"/>                               |  |
| Reference/plan number(s) | <b>Non-Protected Rights/<br/>Ordinary Benefits</b> | <b>Protected Rights/<br/>Contracted Out Benefits</b> |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |

**Transfer payment details - 2**

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|                          |  |  |
|--------------------------|--|--|
| Administrator name       | <input type="text"/>                               |  |
| Transferring scheme name | <input type="text"/>                               |  |
| Reference/plan number(s) | <b>Non-Protected Rights/<br/>Ordinary Benefits</b> | <b>Protected Rights/<br/>Contracted Out Benefits</b> |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |

SIPP number: D  
PFWP number: D

**Transfer payment details - 3**

|                          |  |  |
|--------------------------|--|--|
| Administrator name       |  |  |
| Transferring scheme name |  |  |
| Reference/plan number(s) | <b>Non-Protected Rights/<br/>Ordinary Benefits</b> | <b>Protected Rights/<br/>Contracted Out Benefits</b> |
|                          |  |  |
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|                          |  |  |

**Transfer payment details - 4**

|                          |  |  |
|--------------------------|--|--|
| Administrator name       |  |  |
| Transferring scheme name |  |  |
| Reference/plan number(s) | <b>Non-Protected Rights/<br/>Ordinary Benefits</b> | <b>Protected Rights/<br/>Contracted Out Benefits</b> |
|                          |  |  |
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SIPP number: D  
PFWP number: D

**Transfer payment details - 5**

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|                          |  |  |
|--------------------------|--|--|
| Administrator name       | <input type="text"/>                               |  |
| Transferring scheme name | <input type="text"/>                               |  |
| Reference/plan number(s) | <b>Non-Protected Rights/<br/>Ordinary Benefits</b> | <b>Protected Rights/<br/>Contracted Out Benefits</b> |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |
|                          | <input type="text"/>                               | <input type="text"/>                                 |

**Ongoing Authorisation**

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I authorise Standard Life to accept instructions from my adviser during the lifetime of my plan to buy or sell investments under my plan.

I also authorise Standard Life to accept information provided by my adviser regarding the amount of the 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 plans.

|           |      |
|-----------|------|
| Signature | Date |
|-----------|------|