

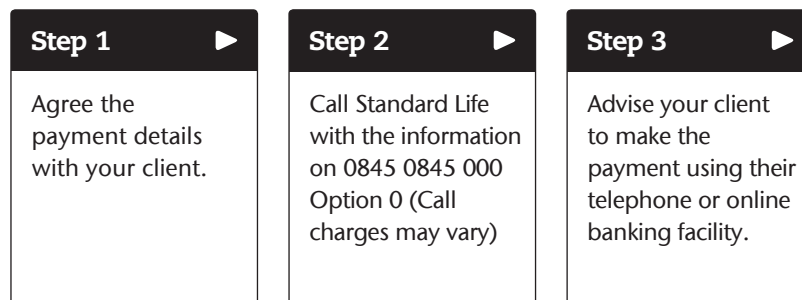
Easier payments – what a relief

This document is intended for qualified financial advisers only and should not be relied upon by anyone else.

It's now easier and quicker for your clients to make payments into their Standard Life SIPP.

Active money – get it moving

Clients can now make electronic payments from their bank account direct to Standard Life. Payments up to £10,000 can be made using the Faster Payment system so the money would normally reach us on the same day. Otherwise BACS or CHAPS can be used. BACS normally takes 3 – 5 working days to reach us. CHAPS is normally same day and your client's bank will probably make a charge for this.



Active investments – get it working

On the day the payment is received by Standard Life, the basic-rate tax relief will be added and the money invested in line with your instructions.

Money will be invested the same day for insured or mutual funds. Otherwise money will go into the SIPP bank account. From there it can be switched to the requested investments.

Active payments – keep it going

For clients who want to make regular payments, you're now able to set up the direct debit on their behalf simply by calling us. We'll process the details and send out confirmation including the direct debit guarantee notice to your client.

We'll still accept payment by cheque. Send it in with a covering letter with the details we need – see the checklist overleaf for more information.

Less paperwork

Cheques, forms, stamps, envelopes?

No need – just call us on 0845 0845 000, Option 0

Call charges may vary.

Information we need from you about your client.

There's no form to fill in – all you need to do is have the information to hand so we can deal with your request quickly and efficiently, saving you time. Use this list to make sure you have all the details needed and then call us on 0845 0845 000, Option 0. Call charges may vary.

Plan number and client name. Who's making the payment? Client, Employer, Third party
What's the payment amount? Is that net or gross?
What payment method are they using? BACS or CHAPS
Your client's bank details (this speeds up the process of matching the payment to the client's SIPP) <ul style="list-style-type: none">• Sort code• Account number• Account name
To help you and us comply with money laundering regulations <ul style="list-style-type: none">• Source of wealth and payment• Employment status and gross annual income
Investment instruction including the investment provider, fund name and amount or percentage to be invested in each fund. (Investments into sigma , FundZone and Fidelity funds will be made on day of receipt of money. Instructions for other investment types may take longer as money will initially be placed in the SIPP bank account.)
Commission details

Information we'll send you to pass to your client

An e-mail confirming

- net payment amount,
- the reference they need to quote
- Standard Life bank details to make the payment to.

Follow up action

Providing the details we've received are correct the payment will be credited to your client's SIPP on date of receipt and confirmation will be issued.

You can check online to see if the payment has been processed.

You can also deal online if you want to make any investment switches.

If the payment isn't received 5 days after your call, we'll contact you.

www.standardlife.co.uk

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