

When to complete this form

Where the trustees of a self-administered scheme want to hold a Synergy Executive Pension as an asset of the scheme, this declaration should be completed. This declaration must accompany a Synergy Executive Pension application (SYEP30). Trustees don't need to complete Part 5 (Other retirement benefits) or Part 11 (Letter of exchange).

Part 1 - Self-administered scheme details

Scheme name		<input type="text"/>	
Date of Trust Deed establishing scheme	<input type="text"/>	Scheme Revenue reference number	<input type="text"/> S <input type="text"/> F <input type="text"/>
Pensions Board reference number	<input type="text"/> P <input type="text"/> B <input type="text"/>		

Part 2 - Trustees declaration

1. We confirm that we have sufficient investment powers under the self-administered scheme to invest in an insurance contract such as a Synergy Executive Pension.
2. We accept total responsibility for all administration needed to comply with relevant legislation and Revenue rules/procedures.
3. We undertake to immediately inform Standard Life if there is a material change to the self-administered scheme or it ceases to be Revenue approved.
4. We agree to be legally bound by the Synergy Executive Pension Policy Provisions.
5. We accept that if we request a transfer out of the Synergy Executive Pension, the transfer must be total, resulting in the termination of the policy.

Part 2 - Trustees declaration (continued)

Important notes

Standard Life in this instance is simply supplying a policy of insurance and will issue standard Synergy Executive Pension documents.

Synergy Executive Pension is a one member arrangement. A separate policy must be set up for each scheme member.

Pensioneer Trustee

Name	
Address	
Signature	Date (DD/MM/YYYY)

Trustee 2

Name	
Address	
Signature	Date (DD/MM/YYYY)

Trustee 3

Name	
Address	
Signature	Date (DD/MM/YYYY)

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