

Filling in this form

Before completing this form, please read your Personal Illustration, Key Features document (SYPPKF1) and Investment Options guide (SYIO1), 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

9 /

Financial adviser's company name

Part 2 - Your personal details

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

Email address

Occupation

Contact number

Date of birth* (DD/MM/YYYY)

* Minimum age is 18.

Part 6 - Your investment choice

In order to complete this section, refer to the Investment Options guide (SYI01).

Indicate how your total contributions as set out in Part 4 are to be allocated

Synergy funds €

and/or

Self-Directed Options €

If you choose to invest in Self-Directed Options, your investment will be initially placed in your Policy Cash Account. You must have enough money in this account to enable us to carry out your instructions.

Synergy funds

Choose from the following range of Synergy funds

If you wish to invest in the Synergy funds, indicate the relevant percentage in the table below.

Standard Life funds								
Standard Life Barclays Multi-Asset Protected 85	<input type="text"/>	%	Fixed Interest	<input type="text"/>	%	Japanese Equity	<input type="text"/>	%
Cautious Managed	<input type="text"/>	%	Global Absolute Return Strategies	<input type="text"/>	%	Managed	<input type="text"/>	%
China Equity	<input type="text"/>	%	Global REIT	<input type="text"/>	%	North American Equity	<input type="text"/>	%
Corporate Bond	<input type="text"/>	%	Global Selector	<input type="text"/>	%	Pacific Basin Equity	<input type="text"/>	%
Euro Inflation Linked Bond	<input type="text"/>	%	India Equity	<input type="text"/>	%	Property	<input type="text"/>	%
European Ethical Equity	<input type="text"/>	%	Irish Equity	<input type="text"/>	%	UK Equity	<input type="text"/>	%
European Equity	<input type="text"/>	%	Euro Global Liquidity	<input type="text"/>	%	European Smaller Companies	<input type="text"/>	%
Standard Life multi-manager funds								
Balanced Multi-Manager	<input type="text"/>	%	Japanese Equity Multi-Manager	<input type="text"/>	%	Pacific Basin Equity Multi-Manager	<input type="text"/>	%
European Equity Multi-Manager	<input type="text"/>	%	North Amer Equity Multi-Manager	<input type="text"/>	%	UK Equity Multi-Manager	<input type="text"/>	%
Global Equity Multi-Manager	<input type="text"/>	%						

For example, if you indicated above that you wish to invest €10,000 in the Synergy 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

Direct property

- Tick this box if you are purchasing a property.
Please provide details of the property you wish to purchase by completing the **Property Information Questionnaire** (SYPIQ).
-

Execution only stockbroking

(please note that when choosing this option you must also complete Parts 7a and 7b)

- Tick this box if you are selecting **execution only stockbroking**.
We will pass your details to **Stocktrade** who will contact you directly.
-

Deposits

If you are selecting this option, fill in the name of the deposit provider and the term you have selected, including the amount.

Deposit provider

Term

€

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 made available to any third parties.

In addition to this, your financial adviser will submit certified copies of the documents used to identify you to Standard Life.

Part 7b - Comply with money laundering regulations

To be completed by the financial adviser

To comply with money laundering regulations, we must confirm that you have verified the identity and address of each policyowner. To comply with this, **please attach certified copies** of one item from the list of photographic identification and certified copies of one item from the list of non photographic identification.

Photographic identification:

- | | |
|---|---|
| <input type="checkbox"/> Current passport | <input type="checkbox"/> Current Identification form (ML 10) containing photo signed by a member of the Gardai |
| <input type="checkbox"/> Current photo card driving licence | <input type="checkbox"/> Immigration certificate of registration (GNIB card) accompanied by letter from Office of Minister for Integration (signed and stamped) |
| <input type="checkbox"/> Current National Identity Card | <input type="checkbox"/> National Age card |

Non photographic identification:

- | | |
|--|---|
| <input type="checkbox"/> Current documentation/cards issued by the Revenue showing the name of the policyholder and their PPSN | <input type="checkbox"/> Current bank statements, or credit/debit card statements, issued by a regulated financial sector designated person in Ireland, EU or comparable jurisdiction (including those printed from the internet) |
| <input type="checkbox"/> Current documentation/cards issued by the Department of Social Protection showing the name of the policyholder and their PPSN | <input type="checkbox"/> Current utility bills (including those printed from the internet) |
| <input type="checkbox"/> Current instrument of a court appointment (such as liquidator, or grant of probate) | <input type="checkbox"/> Current household/motor insurance certificate or renewal notice |
| | <input type="checkbox"/> Current medical card |

For the purposes of the above, current means where a document has a specific expiry date that has not passed or in the absence of a specific expiry date the document was issued within 6 months of the date it is submitted to Standard Life.

Part 8 - Your financial adviser's declaration

To be completed by the financial adviser

1. 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
2. I have advised my client as to the financial consequences of replacing an existing policy with this policy of cancellation or reduction, and of possible financial losses as a result of such replacement
3. 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
4. I have verified the identity of the following policyowner (only applicable if execution only stockbroking is chosen).

Policyowner's name

Financial adviser's name (BLOCK CAPITALS)

Financial adviser's signature

Date
(DD/MM/YYYY)

Regular contributions

Option 1

- 25% max initial*
2% max renewal
1% FBRC

Option 2

- 5% initial
5% renewal
1% FBRC

Option 3

Initial

 %

Renewal (% of premium)

 %

FBRC (% of fund - max 1%)

 %

Single contributions/transfers

Initial (% of premium - max 5%)

 %

FBRC (% of fund - max 1%)

 %

* Not applicable if applicant is 65 or more.

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

Issue policy to

Broker

Client

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 (SYPPKF1) and I agree that my personal information may be used for the purposes described.
2. I authorise the Revenue and the Department of Social Protection to give Standard Life my most recent address held on their records at any time in the future.
3. I have received in writing and read the information specified in my financial adviser's declaration (Part 8).
4. 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.
5. I agree that a copy of this application can be treated as the original for all purposes.
6. 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.
7. I agree to be legally bound by the Synergy Personal Pension policy provisions (SYPP60).
8. I understand 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.

Your signature

Date
(DD/MM/YYYY)

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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 and policy provisions 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.

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 5 – Your investment choice

- Your investment choice
- Synergy funds total adds up to 100%
- Bank deposits include the bank name and term

Part 7 – Your financial adviser’s declaration

- Declaration completed in full

Part 9 – Your payment

- Cheque enclosed
- Or**
- Direct debit instruction completed

(01) 639 7080 www.standardlife.ie newbusiness@standardlife.ie

Standard Life Assurance Limited is authorised and regulated by the Financial Services Authority in the UK and is regulated by the Central Bank of Ireland for conduct of business rules. Standard Life Assurance Limited is registered in Ireland (905495) at 90 St Stephen’s Green, Dublin 2 and Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH. *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

Your instructions to the bank and your signature

- I instruct and authorise you to pay direct debits from my account at the request of Standard Life
- I confirm that the amounts to be debited are variable and may be debited on various dates
- I shall duly notify the bank in writing if I wish to cancel this instruction. I shall also notify Standard Life of such a cancellation



ORIGINATOR'S IDENTIFICATION No.

3 0 4 9 3 5

POLICY NUMBER
OFFICE USE ONLY

Name and full postal address of your bank branch

Name of account holder

Branch sort code

9

Bank account number

Account holder signature

Date
(DD/MM/YYYY)

Some banks may not accept instructions to pay direct debits from, or may not allow them from, some types of account (e.g. most savings accounts). If in doubt, please consult your bank.



Filling in your direct debit instruction

Please make sure that you complete and sign the instruction and date it. Then return it to Standard Life, 90 St Stephen's Green, Dublin 2.

Please ensure that

- your account can handle direct debits (most savings accounts and some banks do not)
- there are sufficient funds in your account to pay the amounts you have agreed to pay, when they are due (especially the first debit when there may be more than one amount collected)

Please remember that

- the policy is not in force until the amount due is paid
- if you fail to pay the amounts when due, procedures may be applied and/or benefits adjusted

Standard Life will

- only collect amounts that we have agreed with the policy owner in advance
- contact the policy owner if a direct debit is rejected by your bank

The Direct Debit Guarantee

- This is a guarantee provided by your own bank as a member of the Direct Debit Scheme, in which banks and originators of direct debits participate
- If you authorise payment by direct debit, then
 - Standard Life will notify the policy owner in advance of the amounts to be debited to your account; and
 - your bank will accept and pay such debits, provided that your account has sufficient available funds
- If it is established that an unauthorised direct debit was charged to your account, you are guaranteed an immediate refund by your bank of the amount charged where you notify your bank without undue delay on becoming aware of the unauthorised direct debit and in any event no later than 13 months of the date of debiting such direct debit to your account
- You are entitled to request a refund of any variable direct debit the amount of which exceeded what you could have reasonably expected, subject to you so requesting your bank within a period of 8 weeks from the date of debiting of such direct debit to your account
- You can instruct your bank to refuse a direct debit payment by writing in good time to your bank
- You can cancel the direct debit instruction by writing in good time to your bank