

Top up check list

Personal pensions and PRSAs

For financial advisers

Deadline for receipt of payment and full top up instructions:

31 October 2011*

*If clients pay and file their taxes through ROS, this is extended to 15 November 2011.

Annual contribution € Single contribution € Total €

PTUPCL V07 0911

Please tick the box

Your details

Company name

Your name

Your Standard Life agency code

Your client's details

Your client's name

Your client's existing policy number

Investment choice

Fund details

Fund name	%

Deposit details

Deposit provider	Term	%

Please ensure that your client's percentage adds up to 100% Total 100%

■ Commission details

Initial % Renewal % FBRC (If applicable) %

- Commission on the Synergy PRSA top ups must be on the same commission terms as the existing policy
- FBRC is only available on the Synergy Personal Pension and Synergy PRSA
- Please refer to 'Commission schedule' document INTS2 V08 0811

■ Cheque enclosed

Which products are open to new business and top ups?

		Open to new business	Open to top ups
Synergy Personal Pension*	Policy numbers begin PP1...	Yes*	Yes
Synergy PRSA	Policy numbers begin PA1, PR1...	Yes*	Yes
Personal Pension Plus	Policy numbers begin 20001, 20002, 20003...	No	Yes
Personal Pension Plan	Policy numbers begin 20000...	No	Yes
Personal Pension Plan	Policy numbers begin 1 or 9...	No	No
PRSA	Policy numbers begin 203, 204, 205...	No	Yes

*New policies require a fully completed application form.

The deposit option is only available on the Synergy Personal Pension and Synergy PRSA.

Please refer to the relevant product guide for investment options

■ Existing Synergy policyholders

Please note these are new requirements if you have entered into an existing Synergy Product prior to 4 April 2011 and now wish to open an execution only stockbroking account.

If you wish to open an account you must complete the 'Synergy Products Stocktrade requirements to open an account' form. (SYMLSTOCK V01 0311)

■ New Business

For the Synergy Personal Pension only, investments into ETFs, require a certificate of appropriateness to be completed.

Only quoted shares and government bonds are available under the Synergy PRSA.