

Filling in this form

Before completing this form, please read your Personal Illustration (pre-sale), Key Features document (SYIBKF1) and Investment Options guide (SYIO1), given to you by your financial adviser.

SYIB30 V20 0212

Part 1 - Your financial adviser's company details

To be completed by your financial adviser

Financial adviser's Standard Life agency code

Financial adviser's company name

Part 2 - Lives assured

Life A

Title Surname

First names (in full)

Address

(House number) Street

City/Town

County

Postcode

Contact number

Date of birth (DD/MM/YYYY)

Relationship of Life A to B

All lives assured and bondowners must be age 75 or younger at date of investment. Lives assured will also be policyowners if part 3 is not completed.

Part 2 - Lives assured (continued)

Life B

Title	Surname	
<input type="text"/>	<input type="text"/>	
First names (in full)		
<input type="text"/>		
Address (House number)	Street	
<input type="text"/>	<input type="text"/>	
City/Town		
<input type="text"/>		
County		
<input type="text"/>		
Postcode	Contact number	Date of birth (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Part 3 - Policyowner

Only complete this section if the bondowner is to be **different** from the lives assured.
(The policyowner is normally the person who receives the proceeds of the policy).

Title	Surname	
<input type="text"/>	<input type="text"/>	
First names (in full)		
<input type="text"/>		
Address (House number)	Street	
<input type="text"/>	<input type="text"/>	
City/Town		
<input type="text"/>		
County		
<input type="text"/>		
Postcode	Contact number	Date of birth (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Insurable interest in Life A and B*		
<input type="text"/>		

* For example, husband/wife; company/director; trustee/beneficiary (attach letter or copy deed).

Part 4 - Your investment

Single premium

€ (minimum €10,000)

We can accept the following payment methods. Please tick the box to indicate which payment method you wish to use:

Direct credit Telegraphic transfer Cheque

- If you wish to send your payment by Direct Credit or Telegraphic Transfer, please contact us on 01 639 7080 for details on how to make the payment
- If you wish to pay by cheque, please make your cheque payable to 'Standard Life Assurance Limited' and enclose the cheque with this application form

Part 5 - Your investment choice

In order to complete this section, refer to the Investment Options guide

Indicate how your premium in Part 4 is 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. 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**.

Standard Life funds

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

Standard Life multi-manager funds

Balanced Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%	Japanese Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%	Pacific Basin Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%
European Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%	North Amer Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%	UK Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%
Global Equity Multi-Manager	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	%						

Self-Directed Options

Exchange Traded funds

Execution only stockbroking

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

If you choose execution only stockbroking, please note that trading is currently limited to Exchange Traded Funds. If it comes to our attention that you have bought non-Exchange Traded Fund investments, we will instruct Stocktrade to sell those investments. Please be aware that in these circumstances, your policy will be charged the cost of selling those investments. The tax status of your policy may change as a result of buying non-Exchange Traded Fund investments.

If you choose to invest in Exchange Traded Funds, you will first need to complete a Brewin Dolphin (Stocktrade) Appropriateness Assessment form. This form is to assess your understanding on the appropriateness of Exchange Traded Funds before you make an investment. This form is available from your financial adviser or by contacting our customer services area. This form should be completed and returned to Standard Life.

If you are uncertain as to whether a particular investment is permitted, please contact your financial adviser or Standard Life for assistance.

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

€

Authorising your financial adviser to give investment instructions on your behalf

Please speak to your financial adviser before completing this section. If you wish to give this authority to your financial adviser, please sign this section.

Note that we will only accept instructions from authorised persons once we are satisfied that we have verified the identity of the authorised person, and it is the responsibility of the authorised person and/or yourself for checking that we have carried out instructions properly.

I authorise Standard Life and any third party to accept instructions from my financial adviser named in Part 1, to buy or sell investments under this policy for the following:

Synergy funds and deposits
(Tick the box, if appropriate)

Execution only stockbroking
(Tick the box, if appropriate)

This authorisation will apply until Standard Life receives a written instruction from me changing or withdrawing my authorisation.

Your signature as policyowner 1

Date
(DD/MM/YYYY)

Your signature as policyowner 2

Date
(DD/MM/YYYY)

Part 6 - Regular withdrawals (optional)

<input type="text"/>	%	of policy value before exit tax (max 5% per annum)		
or				
€ <input type="text"/>		after exit tax (max 5% per annum of premium)		
Frequency	<input type="checkbox"/> Every month	<input type="checkbox"/> Every 3 months	<input type="checkbox"/> Every 6 months	<input type="checkbox"/> Once a year
First payment date (DD/MM/YYYY)	<input type="text"/>	(Choose any day from 1 - 28 of the month. Earliest: 1 month after Start Date; latest: 13 months after Start Date)		
Account number	<input type="text"/>	Bank sort code	<input type="text"/>	<input type="text"/>
Account name	<input type="text"/>			
Bank	<input type="text"/>			
Address	<input type="text"/>			

The minimum regular withdrawal per annum is €900. Please allow at least 3 bank working days for the payment to reach your account.

Payments must be lodged to own or jointly owned Irish personal bank account. Payments cannot be made by cheque.

Part 7a - Money laundering regulations

Due to money laundering regulations, we are required to obtain information about your occupation, income, details of how you acquired the money you are investing before we can accept your application.

Occupation of policyowner 1	<input type="text"/>
Occupation of policyowner 2	<input type="text"/>

Source of wealth

Please tick all that apply.

Please tell us how you acquired the money you are investing.

- | | | | |
|---|--|--|--|
| <input type="checkbox"/> Compensation payment | <input type="checkbox"/> Inheritance | <input type="checkbox"/> Salary/bonus | <input type="checkbox"/> Sale of company |
| <input type="checkbox"/> Divorce settlement | <input type="checkbox"/> Lottery/betting win | <input type="checkbox"/> Sale of investments | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Gift | <input type="checkbox"/> Policy claim/maturity | <input type="checkbox"/> Sale of property | |

Other	<input type="text"/>
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Your annual income before taxation

Please indicate which income band applies to you

If this is a joint application, please state the combined income of the policyowners.

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> Under €15,000 | <input type="checkbox"/> €15,000 to €19,999 | <input type="checkbox"/> €20,000 to €29,999 | <input type="checkbox"/> €30,000 to €39,999 |
| <input type="checkbox"/> €40,000 to €49,999 | <input type="checkbox"/> €50,000 to €59,999 | <input type="checkbox"/> €60,000 to €69,999 | <input type="checkbox"/> €70,000 or more |

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 policyowner 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 12 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 have explored the available investment options with my client and taking into account their circumstances, long term needs, age and attitude to risk, I am satisfied that this policy is suitable for them.
4. 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.
5. I have verified the identity of the following policyowners:

Name of policyowner 1 (in full)

Name of policyowner 2 (in full)

Financial adviser's name (BLOCK CAPITALS)

Financial adviser's signature

Date
(DD/MM/YYYY)

Please complete commission terms to apply

Initial (% of premium)

%

FBRC (% of fund)

%

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 an 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 in my Key Features document (SYIBKF1). 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. The information provided in this application, whether in my handwriting or not, is true and complete.
4. I agree that a copy of this application can be treated as the original for all purposes.
5. I am over age 18 and a resident of Ireland.
6. I have received in writing and read the information specified in 1 and 2 of my financial adviser's declaration (Part 8).
7. If I select the Execution only Stockbroking option, I will only trade in Exchange Traded Funds as listed on schedule of permitted investments, in the Self-Directed Options Guide (SYSDO1).
8. I agree to be legally bound by the Synergy Investment Bond policy provisions (SYIB60).

Your signature as policyowner 1	Date (DD/MM/YYYY)	<input type="text"/>
Your signature as policyowner 2 (if applicable)	Date (DD/MM/YYYY)	<input type="text"/>

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 premium. 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.

Lives A and B – please sign here *only* if different from the policyowner

I, the life assured, declare that the information given is true and complete. I have read and understand the Data Protection Notice in the Key Features document (SYIBKF1). I agree that my personal information may be used for the purposes described.

Signature Life A	Date (DD/MM/YYYY)	<input type="text"/>
Signature Life B (if applicable)	Date (DD/MM/YYYY)	<input type="text"/>

If you are a named life assured only, you will not benefit from this policy.

Telephone (01) 639 7080 Email synergy@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.* www.standardlife.ie