

Filling in this form

GSLTUP V01 0811

This check list can be used for additional investments to existing policies.

Checklist

Contribution or premium details

Have you distinguished between annual and single?

Your agency details

Have you included your company name?

Have you included your Standard Life agency code?

Your client's details

Have you included their name and existing policy number?

Your client's investment choice

Have you included their fund choice and relevant percentage?

If they have chosen bank deposits, have you included the bank name, term and relevant percentage?

Commission details

Have you included your initial, renewal and fund based renewal commission percentages?

Cheque enclosed

Have you enclosed the contribution or premium payment?

Outstanding details

Telephone (01) 639 7000 Email customerservice@standardlife.ie Website www.brokerzone.ie

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