

Adding a new member to an existing company pension plan

Application form

EP31 V09 1119

Before you complete this form

Please read your Illustration and Investment Options guide (EPPLUS11 for Executive Pension Plus, CPSIO for Corporate Pension Series or TOWER11 for Tower Pension Series), given to you by your financial adviser.

Existing Executive Pension Plus, Corporate Pension Series or Tower Pension Series plan numbered

Name of Plan

Part 1 - Member details

Title

First names
(in full)

Surname

Personal Public Service number

Date of birth
(DD/MM/YYYY)

Spouse/civil partner's date of birth
(DD/MM/YYYY)

Single/
widowed/
divorced

Married/civil partnership/
separated

Current annual salary

Additional benefits*

* For example, benefit in kind, bonus etc..

Date of joining company
(DD/MM/YYYY)

Normal Retirement Age

Does the employee alone, or together with his or her spouse/civil partner and/or minor children, directly or indirectly own or control more than 20% of the voting rights of the employer?

 Yes

 No

Part 3 - Fund choice

Fund name		
		%
		%
		%
		%
Please ensure that your percentage adds up to 100%	Total	100%

Please ensure you give full fund name, as listed in Investment Options guides (EPPLUS11 for Executive Pension Plus, CPSIO for Corporate Pension Series or TOWER11 for Tower Pension Series).

We will assume that the fund choice applies to the allocation of all contributions stated in this application, unless you tell us otherwise.

Politically exposed persons

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations.

A PEP is an individual who is, or has at any time in the last 12 months held one of the following positions, in Ireland or abroad:

- head of a state or government, or a minister
- member of a parliament or similar legislative body
- member of the governing body of a political party
- member of a supreme court, constitutional court or other high-level judicial body
- member of a court of auditors or board of a central bank
- an ambassador, chargé d'affaires or high-ranking officer in the armed forces
- member of an administrative, management or supervisory body of a state-owned enterprise
- director, deputy director, or member of the board of (or person performing the equivalent function in relation to) an international organisation

Are you, or any other party to this application, now, or previously been a

- politically exposed person (PEP)
- close relative of a PEP, or
- close business associate of a PEP?

Yes No

If yes, please give details.

Role* in policy	Role holder's name	Role holder's relationship to PEP	PEP	Position held by the PEP
<i>For example, member</i>	<i>Anne Murphy-Smith</i>	<i>daughter-in-law</i>	<i>Hugo Smith</i>	<i>Director, UK Post Office</i>

If you are a PEP, or a close relative or close associate of a PEP, we must apply enhanced customer due diligence procedures. You may be required to provide additional information and documentation (such as your source of funds, wealth, and identity).

*Trustee or member.

Part 4 - Trustee's declaration

- We confirm that this completed application is the basis for the benefits to be provided under this pension plan and we agree that a copy of this application can be treated as the original for all purposes
- We have read the Data Protection Notice (Part 5) and we agree that our personal information may be used for the purposes described
- We have shown the Data Protection Notice (Part 5) to the member and we confirm that they have read it and have agreed to their personal data being used for the purposes described
- We declare that the answers provided in this and other related forms (if any), are true and correct to the best of our knowledge and belief

Trustees signatures



Date

(DD/MM/YYYY)

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 form will be made available on request.

To read our Privacy Policy, visit www.standardlife.ie/privacy


Signature

Part 5 - Data Protection Notice - Using your personal information

We will collect and use personal information about you such as your name, date of birth and address in order to provide this product or service and manage our relationship with you. It may be necessary as part of this product or service to collect and use personal information which is defined as 'sensitive' by data protection law. Any sensitive personal information will only be collected and used where it's needed to provide the product or service you have requested or to comply with our legal and regulatory obligations and where we have obtained your explicit consent to process such information.

To provide this product or service and meet our legal and regulatory obligations, we will keep your personal information and copies of records we create (for example, phone calls with us) while you are a customer of ours. Even when you no longer have a relationship with us, we are required to keep information for different legal and regulatory reasons. The length of time will vary and we regularly review our retention periods to make sure they comply with all laws and regulations.

The information collected may be shared with other parts of the Phoenix Group and other companies we work with to support us in the provision of the product or service you have with us. We may also share your information with our regulators (for example, the Central Bank of Ireland), the Revenue Commissioners, your financial adviser, and for applicable products and services, your employer where necessary and lawful to do so. Whenever we share your personal information, we will do so in line with our obligations to keep your information safe and secure.

The majority of your information is processed in Ireland. However, some of your information may be processed by us or the third parties we work with outside of the European Economic Area (EEA), including countries such as the UK and USA. Where your information is being processed outside of the EEA, we take additional steps to ensure that your information is protected to at least an equivalent level as would be applied by Irish data privacy laws, for example, we will put in place legal agreements with our third party suppliers and do regular checks to ensure they meet these obligations.

For more information on how we process your personal information and what your rights are, please read our Privacy Policy at www.standardlife.ie/privacy or write to the Data Protection Officer, Standard Life, 90 St Stephen's Green, Dublin 2.

We may make changes to this notice. If we do, we will update our Privacy Policy on www.standardlife.ie/privacy

Part 6 - Your financial adviser's details and instructions

To be completed by your financial adviser

Financial adviser's Standard Life agency code /

Financial adviser's company name

Same commission basis as last member or **Other** **Initial** (% of premium) % **Renewal** (% of premium) %

Issue policy to Financial adviser Client

Renewal commission is not available on single contributions. For policy numbers beginning L (Tower): 1.25% x term to NRA or 65, whichever is earlier (max 25%), Renewal max 2%.

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