

Pension Season 2021

Your quick reference

For financial advisers only

Key Dates for Personal & Corporate Pension holders

31 October 2021	17 November 2021	31 December 2021
Cut off for “Pay and File” customers	Cut off for “Pay and File” online customers	Cut off for Corporate Pension
To get this “received” date of 31 October, please ensure your client’s fully completed application and payment are with Standard Life on or before this date.	To get this “received” date of 17 November, please ensure your client’s fully completed application and payment are received by Standard Life on or before this date.	To get this “received” date of 31 December, please ensure your client’s fully completed application and payment are received by Standard Life on or before this date.

How to send us the paperwork for your client’s contribution

By post: New Business Team, Standard Life, 90 St Stephen’s Green, Dublin D02 F653

By email: newbusiness@standardlife.ie*

* If you scan and email documents containing personal information, you must apply adequate protection. There’s no guarantee that any email you send us will be received, or that it will remain private and unaltered during internet transmission.

How to make payment for your client’s contribution

1) Via cheque or Bank Draft made payable to Standard Life. This can accompany your application form, or if sending in separately please ensure to reference your client’s policy number and name. If paying by Bank Draft, please email in your client’s IBAN for Anti-Money laundering purposes. Please allow enough time for post to be delivered.

2) Electronic Fund Transfers (EFT)

Account name: Standard Life International

Bank: Ulster Bank Ireland dac

Swift Code/BIC: ULSBIE2D

IBAN: IE51ULSB98501005292222

EFT payments can take 3-5 working days to transfer between accounts. All client monies being transferred to the Standard Life bank account will be dated as of the date that the funds reach our account. If client monies have not reached our account by the deadline date, they will have missed the cut off for Revenue for 2020 tax year. Please reference your clients name and date of birth or policy number when transferring client monies by EFT.

Key requirements for Pension Top ups

Personal Pension	PRSA	Executive Pension
Payment (cheque/draft/EFT)	Payment (cheque/draft/EFT)	Payment (cheque/draft/EFT)
Fund choice for investment	Fund choice for investment	Fund choice for investment
Initial Commission	Employee/Employer split	Initial Commission
Fund based renewal commission (FBRC)		Fund based renewal commission (FBRC)
		Employee/Employer split
		Updated salary for relevant employment
		Updated Retained Benefits

Please note, the allocation date of your investment is when Standard Life have received all requirements.

You can keep up to date with your client’s application through Pipeline on Client View.

Visit www.brokerzone.ie for more information.