

Part 1 - Financial adviser's details

Financial adviser's Standard Life agency code /

Financial adviser's company name

Your client's details

First names

Surname

Existing policy number to be topped up

If a savings or investment policy, is the policy owner resident for tax purposes anywhere other than the Republic of Ireland? Yes No

If yes, please tell us where and give us their relevant Taxpayer Identification Number (TIN):

Country

TIN

Premium details

Savings/Investment	Pensions
Single premium <input type="text" value="€"/>	Employer single contribution <input type="text" value="€"/>
	Employee single contribution <input type="text" value="€"/>
	Employee single AVC <input type="text" value="€"/>
	Transfer payment* <input type="text" value="€"/>

* Complete transfer payment section on page 4 also.

Source account details

Please give account details from where money was drawn

International Bank Account Number (IBAN)

Name on account

Investment choice

Funds		%

Deposits***		
Deposits provider	Term	%

Execution only Stockbroking***	%

Please ensure that your client's percentage adds up to 100%	Total	100%
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***Deposits and Execution only Stockbroking only available on Synergy policies with policy numbers beginning A, E, P, and R.

If opening an execution only stockbroking account, you must complete the Stocktrade Requirements (SYEOS1), and for ETFs, the Alliance Savings Trust Appropriateness Assessment form.

Commission details

Synergy Executive or Personal Pension (policy numbers begin EP or PP) started before 1 September 2014

Please select your Flexible and clear pricing option (tick the appropriate box)

A B Term to NRA ≥ 1 and ≤ 5 complete years Term to NRA < 1 complete years

Initial (% of premium)

% (Max 5.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

Synergy Executive or Personal Pension (policy numbers begin EP or PP) started after 1 September 2014

The policy's Flexible and clear pricing structure has already been set. If the term remaining is now 5 years or less, see the Products from Standard Life for financial advisers (SYAPS) for short terms information.

Initial (% of premium)

% (Max 5.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

Synergy PRSA (policy numbers begin PR or PA), or PRSA PRF, PRN and PRS (policy numbers begin 203, 204 or 205)

The policy's pricing structure has already been set for all contributions and transfer payments. For more information on Synergy PRSA, see the Products from Standard Life for financial advisers (SYAPS), and for PRSA PRF, PRS and PRN, Commission rates Schedule 2 (INTS2).

For Flexible and clear pricing information, refer to Products from Standard Life for financial advisers (SYAPS).

No commission is payable for a term of less than 1 year.

FBRC frequency is set at policy level and, once set, cannot be changed. If you are taking FBRC for the first time, tell us what frequency you want.

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Commission details continued

Synergy Investment Bond or ARF (460 or 760)

Initial (% of premium)

% (Max 3.00%. If nil, insert 0%) FBRC is set at policy level and, once set, cannot be changed.

Synergy Investment Bond or ARF (policy numbers begin AB or AR) started before 1 September 2014

Please select your Flexible and clear pricing option A B
(tick the appropriate box)

Initial (% of premium)

% (Max 4.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

FBRC frequency is set at policy level and, once set, cannot be changed. If you are taking FBRC for the first time, tell us what frequency you want.

Synergy Investment Bond or ARF (policy numbers begin AB or AR) started after 1 September 2014

The policy's Flexible and clear pricing structure has already been set.

Initial (% of premium)

% (Max 4.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

FBRC frequency is set at policy level and, once set, cannot be changed. If you are taking FBRC for the first time, tell us what frequency you want.

Synergy Regular Invest (policy numbers begin RP)

Initial (% of premium)

% (Max 3.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

FBRC frequency is set at policy level and, once set, cannot be changed. If you are taking FBRC for the first time, tell us what frequency you want.

Synergy Portfolio Bond or Portfolio ARF (policy numbers begin 461 or 762)

Initial (% of premium)

% (Max 3.00%. If nil, insert 0%) FBRC is set at policy level and, once set, cannot be changed.

Synergy Portfolio Bond or Portfolio ARF (policy numbers begin AC or AS)

Initial (% of premium)

% (Max 4.00%. If nil, insert 0%)

FBRC (% of fund)

% (Max 1.00%. If nil, insert 0%)

FBRC frequency is set at policy level and, once set, cannot be changed. If you are taking FBRC for the first time, tell us what frequency you want.

Other products

Same commission basis as last single premium top up to this policy or

Initial (% of premium)

%

Renewal (% of premium)

%

For office use only

FPCC

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Source of wealth

Tell us how you acquired the money you are investing. Tick all that apply.

- | | | | |
|---|--|--|--|
| <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

In certain circumstances, we may request further information.

Under anti-money laundering regulations, we are obliged to keep customer information up to date. Therefore, we may request evidence of identity and address if the documentation we have on file is expired or not recent.

Transfer payment details

Name of plan from which transfer payment originates

Revenue/HMRC reference number of the transferring plan

Payment breakdown

Employer contributions value € Employee contributions value € AVCs value €

Is the transfer payment subject to any Family Law proceedings? (for example, Pension or Property Adjustment Order) Yes No

If Yes, you should enclose a copy of the Notice or Order.

Top ups to buy out bonds are not allowed.

Financial adviser's signature

Financial adviser's signature

Financial adviser's name

Date (DD/MM/YYYY)


Signature

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