

**SYEP31 V09 0518**

### Before you complete this form

Please read your Illustration, Investment Options guide (SYI01) and Self-Directed Options guide (SYSD01), given to you by your financial adviser. Synergy Executive Pension is a one member arrangement. A separate policy must be set up for each scheme member.

### 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 - Self-administered scheme details

Scheme name

Trustees' email

Date of Trust Deed establishing scheme (DD/MM/YYYY)

Scheme Revenue reference number

Pensions Authority reference number

We may use your email to help manage your policy. If you don't want us to use it, leave it blank.

### Part 3 - Member details

Tick this box if you're already a customer of Standard Life  Please give us one of your policy numbers

Title

First names (in full)

Surname

Normal Retirement Age\*  (Must be age 60 - 70)

Date of birth\*\* (DD/MM/YYYY)

Personal Public Service number

\* For regular (monthly, quarterly, half yearly) contributions, there must be at least one year between your start date and retirement age. For a term of less than one year you can only have a yearly contribution or a single contribution.

\*\* Minimum age is 18.



## Funds

In order to complete this section, refer to the Investment Options guide (SYIO1).

Fund name	% of premium
	%
	%
	%
	%
<b>Please ensure that your percentage adds up to 100%</b>	<b>Total 100%</b>

Please ensure you give full fund name, as listed in Investment Options guide (SYIO1).

If you wish to invest in funds, indicate the relevant fund name and percentage in the table. For example, if you indicated above that you wish to invest €10,000 in funds, and you want all of this amount to be invested in the Standard Life Managed Fund, you would write **Managed 100%**

## Self-Directed Options

### Direct property

- Tick this box if you are purchasing a property. Please provide details of the property you wish to purchase by completing the **Property Information Questionnaire (SYPIQ)**.

### Deposits

Deposit provider	Deposit amount €	Deposit account term

There are minimum investment amounts applied by the Deposit providers. Please see [www.standardlife.ie](http://www.standardlife.ie) for the minimums that apply.

### 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.
- Tick this box if you want to set up a Stocktrade online account now to deal or view (Stocktrade account charges will apply)^
- Tick this box if you're an Irish national. If you're not, or you have dual nationality/citizenship, please give details

Nationality

National client identifier\*

Your occupation

Please indicate which income band applies to you

- Under €20,000     €20,000 to €34,999     €35,000 to €49,999     €50,000 to €74,999     €75,000+

You'll also need to attach certified copies of one of each of the following:

- Proof of identity, for example
- Current passport
  - Current EU driving licence
- and**
- Proof of address, for example
- Recent bill (electricity, phone or gas)
  - Recent statement (bank or credit union)
  - Recent document from Revenue or Dept of Social Protection

You are only allowed to trade in investments that are permitted by Standard Life. If it comes to our attention that you have bought non-permitted investments, we will instruct Stocktrade to sell those investments. In these circumstances, your policy will be charged the cost of selling those investments. If you are uncertain as to whether a particular investment is permitted, contact your financial adviser or Standard Life.

^ Stocktrade will use your email address given in Part 2 to set up your online account. An additional charge applies for each deal arranged by post, email or fax.

\* This could be your passport number or personal identity code, depending on country. For example, in UK, it's your National Insurance number. For other countries, see Execution-only stockbroking form (SYEOS1).

Current means not expired and recent means issued in the last 6 months.

If you don't have a particular document, talk to us or your financial adviser about alternatives.

## Authorising Standard Life to accept instructions from your financial adviser on your behalf

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 to verify that your instructions have been carried out properly.

I authorise Standard Life to accept instructions from my financial adviser named in Part 1, to buy or sell Funds and Deposits under this policy.

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

Trustees  
signatures



Date

(DD/MM/YYYY)

Please speak to your financial adviser before completing this section.



Signature

## Part 7 - 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 Standard Life Aberdeen plc 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 and European Economic Area (EEA). However, some of your information may be processed by us or the third parties we work with outside of the EEA, including countries such as the United States. 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 EEA 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 Standard Life International dac or Standard Life Assurance Limited (Irish branch) process your personal information and what your rights are, please read our Privacy Policy at [www.standardlife.ie/privacy](http://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](http://www.standardlife.ie/privacy)



## Part 9 - Your declaration as trustees

Please read carefully before signing.

**WARNING: If you propose to enter into this executive pension contract in complete or partial replacement of any existing pension arrangement, please take special care to satisfy yourself that this executive pension contract meets your needs. In particular, please make sure that you are aware of the financial consequences of replacing your existing pension arrangement. Please take particular care if you are giving up any guarantees. If you are in doubt about this, please contact your financial adviser.**

1. We confirm that we have sufficient investment powers under the self-administered scheme to invest in an insurance contract such as a Synergy Executive Pension.
2. We accept total responsibility for all administration needed to comply with relevant legislation and Revenue rules/procedures.
3. We undertake to immediately inform Standard Life if there is a material change to the self-administered scheme or it ceases to be Revenue approved.
4. We accept that if we request a transfer out of the Synergy Executive Pension, the transfer must be total, resulting in the termination of the policy.
5. We have read the Data Protection Notice (Part 7) and we agree that our personal information may be used for the purposes described.
6. We have shown the Data Protection Notice (Part 7) to the member and we confirm that they have read it, and have agreed to their personal data being used for the purposes described.
7. We agree that a copy of this application can be treated as the original for all purposes.
8. We declare that the information provided in this and other related forms (if any) are true and correct to the best of our knowledge and belief.
9. We agree to be legally bound by the Synergy Executive Pension policy provisions (SYEP60).

### Important notes

- Standard Life in this instance is simply supplying a policy of insurance and will issue standard Synergy Executive Pension documents.
- The standard Synergy Executive Pension Rules will not apply. The trustees of the scheme are responsible for ensuring the rules of the existing self-administered scheme are applied.
- Standard Life is not acting as Registered Administrator.

**Part 9 - Your declaration as trustees (continued)**

**Pensioner Trustee**

Trustee name

Address

**Signature**

**Date**  
(DD/MM/YYYY)



Signature

**Trustee 2**

Trustee name

Address

**Signature**

**Date**  
(DD/MM/YYYY)



Signature

**Trustee 3**

Trustee name

Address

**Signature**

**Date**  
(DD/MM/YYYY)



Signature

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 any 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 will be sent to you on request. We will start the policy immediately or on the start date you have given us, whichever is later, and your policy documents will be issued. There may be a delay in collecting the first contributions while the direct debit is set up with your bank.

(01) 639 7000 [www.standardlife.ie](http://www.standardlife.ie) [customerservice@standardlife.ie](mailto:customerservice@standardlife.ie)

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