

### Filling in this form

This form should only be used by the trustees of an existing trust where they wish to invest some of the trust monies in a life investment policy with Standard Life and the relevant Synergy Investment Bond or Synergy Regular Invest application has been completed.

**Standard Life does not give financial and/or legal advice. We strongly recommend you seek professional advice.**

### ET30 V02 1215

All trustees should be resident in Ireland. If not, there may be legal and/or tax implications.

### Trust details

Name of Trust

Names of Beneficiaries

Trust date (DD/MM/YYYY)  If a charity, please give registered number  **C H Y**

**Does the Trust allow for authorised signatories to sign on behalf of all trustees?** Yes  No   
 If yes, what are the criteria/restrictions?  
 (for example, at least 2 must sign, 3 for transactions €50,000+)

Authorised signatory: normally a trustee or officer delegated to sign on behalf of all the trustees as set out in trust. For example, 2 trustees may be authorised signatories to jointly sign on behalf of a trust with 4 trustees.

### Give details of all the trustees and/or authorised signatories (and tick as appropriate)

Title 1  Trustee  and/or Authorised Signatory

First names 1 (in full)

Surname 1

Address   
 Eircode

Title 2  Trustee  and/or Authorised Signatory

First names 2 (in full)

Surname 2

Address   
 Eircode

**Trust details (continued)**

Title 3     Trustee  and/or Authorised Signatory

First names 3 (in full)

Surname 3

Address   
  
 Eircode

Title 4     Trustee  and/or Authorised Signatory

First names 4 (in full)

Surname 4

Address   
  
 Eircode

Title 5     Trustee  and/or Authorised Signatory

First names 5 (in full)

Surname 5

Address   
  
 Eircode

**Foreign Account Tax Compliance Act and Common Reporting Standard**

**Are any of the Trustees or Beneficiaries a resident for tax purposes outside the Republic of Ireland?** If yes, please give their names and details:

Yes  No

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution?  Yes  No

If yes, please provide your GIIN

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution?  Yes  No

If yes, please provide your GIIN

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution?  Yes  No

If yes, please provide your GIIN

If you need more space to list them all and/or all their tax residences, please copy this page.

## Your declaration

We, the authorised signatories of this Trust, confirm that

- we are acting on behalf of and for the exclusive benefit of the Trust
- the trustees have authorised us to act on behalf of all the trustees in respect of this investment
- all investment instructions are and will be made in line with any investment restrictions which may apply to this Trust and applicable law
- this Trust has the power to invest in a life investment policy
- this Trust has an insurable interest in the lives assured named in the application form
- we have obtained (or had the opportunity to obtain) independent legal and financial advice before making this investment

If there are no authorised signatories delegated to sign on behalf of all trustees, all trustees must sign.

This declaration may be executed in a number of counterparts, each of which will be deemed to be an original, but all of which will constitute one and the same instrument.

### Signature

(all authorised signatories must sign)

### Date

(DD/MM/YYYY)

Name

### Signature

### Date

(DD/MM/YYYY)

Name

### Signature

### Date

(DD/MM/YYYY)

Name

### Signature

### Date

(DD/MM/YYYY)

Name

### Signature

### Date

(DD/MM/YYYY)

Name



Signature



Signature



Signature



Signature



Signature

## What should accompany this declaration?

- The Trust's completed Synergy application
- Where the Trust's beneficiaries are named, a list of beneficiaries together with their individual answers to:
  1. If you are a Policy owner, are you resident for tax purposes anywhere other than the Republic of Ireland? and
  2. If yes, please tell us where and give us your relevant Taxpayer Identification Number (TIN)
- Identification documents of all authorised signatories
- If a charity and claiming exit tax exemption, the Revenue Declaration referred to in Section 730D(2)(b) of the Taxes Consolidation Act, 1997.



For more information on identification documents, see Synergy application.

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