

# SIPP Application (for transfers, single and regular monthly payments)

## FSIPP30a

Please complete in BLOCK CAPITALS using BLACK INK.

**PLEASE NOTE:** Any applications received that are not completed correctly may incur delays or may have to be returned to you.

Form Code

90714

Source Code

The FundsNetwork™ platform is a service provided by Financial Administration Services Limited (referred to herein as “FundsNetwork”), which is a Fidelity Group Company. When we refer to “Standard Life” we mean “Standard Life Assurance Limited”. The FundsNetwork SIPP provided by Standard Life is available exclusively to individual investors, through FundsNetwork. It is not available direct from Standard Life.

### WHO THIS FORM IS FOR

You should use this form to transfer existing pension plans and/or make single or regular payments into a FundsNetwork Self Invested Personal Pension provided by Standard Life (the “SIPP”). Both you and your Intermediary are required to complete this form. Your Intermediary will advise you on whether you are eligible for this contract and what options are most suitable for you. In the Application Form, SIPP Key Features Document (FSIPP17) and SIPP Terms and Conditions (FSIPP62), “we”, “our” and “us” refer to Standard Life.

**Please complete form FSIPP30 if you want to invest in non-core investments, take benefits immediately or transfer from a plan in which an income is already being drawn. (‘Non-core investments’, include any investment other than FundsNetwork funds or the Standard Life Investment Policy funds.)**

**Complete FSIPP31 if you want to make additional single payments to an existing plan.**

### FILLING IN THIS FORM

**Please use BLOCK CAPITALS to fill in this form and for any additional instructions you give us. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.**

Your Intermediary is acting on your behalf where you are taking advice and also regarding completion of this form. Your Intermediary will be able to help you complete the SIPP Application Form and provide more guidance as required. Your Intermediary will also be able to provide you with any of the additional documents mentioned in the Application Form.

Contracted-out benefits (which are Protected Rights (PR), Guaranteed Minimum Pension (GMP) or Section 9(2B) Rights built up in another pension scheme or policy) can be accepted into the SIPP.

By filling in this form you are applying to enter into a contract with Standard Life. This application will be the basis of the contract if Standard Life accepts your application. Standard Life will provide you with a copy of this form and the terms and conditions of the contract on request.

Until your application has been accepted by Standard Life, their liability is limited to a return of the payments you have made.

**It is a serious offence to give false statements. The penalties are severe and could lead to prosecution. You must tell us all ‘material’ facts. These are facts that affect whether or not we can accept your application. You must tell us if any information changes before your plan starts. If you don’t or you fail to tell us any other relevant information, it may make your plan void.**

## 1. Planholder Details

### 1a Planholder’s Details

The information supplied will be held in the strictest confidence and is subject to the provisions of Data Protection legislation.

Title (Mr/Mrs/Miss/Ms/Other e.g. Dr/Rev)

Surname

First Name(s) in Full

Applicant’s Permanent Residential Address (“Care Of” and PO Box not acceptable.)

House Name and/or Number and Street, City, County and Country Details

  
  
  


Home Telephone Number

Daytime Telephone Number (in case of query)

National Insurance Number (Will be 9 characters: 2 letters, 6 numbers followed by the letter A, B, C, or D.)

Postcode

 - 

Date of Birth

 /  / 

Existing Client? (please mark an X in the box)

Fidelity Account or Client Number (if known)

Gender

(please mark an X in the relevant box)

Male  or Female

Marital Status (please mark an X in the relevant box)

Married/Civil Partnership	Single	Separated	Divorced/Dissolved Civil Partnership	Widowed/Surviving Civil Partner
<input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>

A civil partnership is a legal contract between two partners of the same sex.

At what date would you like to start taking your benefits? (We will assume the day before your 75th birthday if you leave this blank).

 /  / 

The minimum age that you can take your benefits from is age 50. This will change to 55 on 6 April 2010. If you are transferring as part of a block transfer you may be able to take your benefits earlier than 55. The maximum age at which you can take your tax-free lump sum is the day before your 75th birthday. Speak to your Intermediary for further details.

Please send your completed form to your Intermediary or to Fidelity International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.



Are you currently (please mark an X in the relevant box)

Employed <input type="checkbox"/>	or	Self-Employed <input type="checkbox"/>	or	Not Employed <input type="checkbox"/>	or	Full Time Education <input type="checkbox"/>	or	Pensioner <input type="checkbox"/>	or	Carer for a person under age 16 <input type="checkbox"/>	or	Carer for a person over age 16 <input type="checkbox"/>	or	Under 16 <input type="checkbox"/>	or	Other <input type="checkbox"/>
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Please mark X in the 'Pensioner' box if you are chargeable to 'Schedule E' tax on a retirement pension. If you fall into more than one category please mark X in the most appropriate box.

If other, please specify

1b — Eligibility

To be eligible for this plan, you must answer 'Yes' to one of the following questions:

1. Are you resident in the UK for tax purposes? YES  **or** NO  If 'No', go to question 2. If 'Yes', go to Section 1c.

If you are in any doubt as to whether or not you are 'resident in the UK' you should check with your UK tax inspector.

2. Are you a Crown Servant performing duties abroad, or married to or in a civil partnership with such a Crown Servant?  **or**  If 'No', please speak to your Intermediary.

If you are in any doubt as to whether or not you are a 'Crown Servant performing duties abroad', you should check with your payroll department. If you move abroad after taking out a SIPP, there may be restrictions on moving money into FundsNetwork funds.

1c — Occupational Pension Schemes

1. Are you a member of your employer's occupational pension scheme? YES  **or** NO

An occupational pension scheme is an employer's pension scheme which promises to provide you with a pension and / or a lump sum on retirement.

It does not include:

- (i) any personal pension scheme, or group personal pension scheme, even if your employer pays into it;
- (ii) any stakeholder pension scheme, or group stakeholder pension scheme, even if your employer pays into it;
- (iii) any scheme which pays benefits only on your death; or
- (iv) any scheme which is not registered with HM Revenue & Customs.

The scheme is not necessarily run directly by your employer. It may be a scheme for employees within a particular trade or industry run by a representative body and to which your employer pays.

2. Have you opted out of an occupational pension scheme or are you planning to opt out of an occupational pension scheme in favour of making payments to this plan? YES  **or** NO

3. Have you chosen not to join an occupational pension scheme which you are currently eligible to join, or which you will be able to join at the end of a specified waiting period, in favour of making payments to this plan? YES  **or** NO

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# The SIPP

Please complete in BLOCK CAPITALS using BLACK INK.

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Form Code

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## 1d Intermediary Details

This section should only be completed by Intermediaries. Please enter the appropriate details here and avoid supplying information on separate sheets. The 'Contact Name' we require is the name of the Registered Individual who advised on the Self Invested Personal Pension.

Agency Name

Contact Name

Unique Adviser Number

FSA Firm ref No. — I confirm that I am registered with the FSA to conduct business and my authorisation number is:

Email Address

Telephone Number(s)

## 1e Sales Details

Please confirm that advice has been given  YES  OR  NO

By completing this section, you are confirming that you are taking responsibility for submitting this piece of business for your client. (Please note, that we will return any form containing pension transfer business if you do not complete this section).

Company Stamp

Please note that the company stamp box must be stamped.

## 2. Transfers

### Important Notes on Transferring Benefits

You only need to complete this section if you wish to transfer benefits from another pension scheme or policy.

- You should understand the potential risks of pension transfers, which are summarised in the Key Features Document (FSIPP17).
- Assets from another pension scheme or policy can be transferred 'in-specie'. This means transferring the ownership of the asset instead of its cash value. If you wish to transfer assets 'in-specie', please provide us with a list of the assets you wish to transfer. This will allow us to check that the assets on the list are acceptable to us. If the assets are not acceptable to us, we will advise both your current provider and your Intermediary. Your Intermediary will be able to provide you with further advice if this is the case. Please refer to the Key Features Document (FSIPP17) for information on the charges for this type of transfer.
- If you are transferring more than 1 plan, please photocopy page 4 of the Application Form for additional plans and when complete, attach the photocopies to the Application Form.
- **Transfer payments can be made by BACS, cheque or telegraphic transfer and should be made payable and sent to Standard Life.**
- If you do not receive plan documentation from Standard Life within 4-6 weeks of submitting your transfer application, please contact your existing provider for a progress report. (Please note; pension transfers can take upwards of 4 - 6 weeks on average to complete. However, depending on your existing provider, the transfer may take up to 6 months to complete.)

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## 2. Transfers - (continued)

2a — Details of the Plan from which you are Transferring

Reference / Policy Number

Your 'reference number' or 'policy number' is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

Transferring Scheme Name

Name and address of the administrator of the transferring scheme

  
  
  


Telephone Number

Postcode

 - 

Contact Name at Administrators

1. What is the estimated total value of this transfer payment?

£

Please provide a split of this transfer payment as follows:

• **Ordinary (non contracted-out) Benefits**

a) Value of the ordinary (non contracted-out) benefits

£

• **Contracted-out benefits**

b) Value of the contracted-out benefits

£

c) Cash value of Protected Rights in respect of employment before 6 April 1997.

£

d) Cash value of Protected Rights in respect of employment after 5 April 1997.

£

e) Cash value of Guaranteed Minimum Pension.

£

f) Cash value of Section 9 (2B) Rights.

£

2. Is this transfer payment part of a block transfer?

YES  or NO

If 'Yes', please call Fundsnetwork on 0800 023 41 41 for further information.

A block transfer is an option where at least 2 members transfer their benefits from one scheme to another. (Not all members of the scheme must transfer). Both the ceding and new scheme must be the same for both members and the transfer should be made as one payment to the new scheme. This protects the members rights to a tax-free lump sum over 25% or an early retirement age. This protection can only apply to one block transfer.

3. Are any of the assets to be transferred 'in-specie'?

YES  or NO

Eligible funds can be transferred in-specie from Small Self Administered Schemes, Self Invested Personal Pensions or Executive Personal Pension Schemes.

4. Does any part of the transfer payment relate to pension benefits from your ex-spouse/ex-civil partner on divorce/dissolution of a civil partnership?

YES  or NO

If 'No' go to question 6.

5. Was any part of your ex-spouse's/civil partner's pension already in payment at the time of the divorce/dissolution of the civil partnership?

YES  or NO

If 'Yes', we'll ask the transferring scheme to confirm what proportion of the transferred funds this applies to.

6. Is the scheme or plan you are transferring from an occupational pension scheme?

YES  or NO

A transfer from an occupational pension scheme can only be accepted if you have received financial advice (see Section 1c).

# The SIPP

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90716

## 3. Payments - Regular Monthly or Single Payment(s)

### General Notes On Payments

- If you are self-employed any payments made from the partnership bank account should be reimbursed, as applicable.
- Enhanced Protection: If you have registered for Enhanced Protection you cannot make any payments and should not complete this section. Go to section 4.
- If you 'recycle' a tax-free lump sum you may face a tax charge. Leaflet FGEN449 - 'Recycling of lump sums' explains what recycling means and what the tax consequences are.
- The minimum payment you can make to set up the plan is £300 a month, £3,000 a year or a single payment of £10,000. (All figures shown are gross).
- Single payments must be made by cheque. Remember to enclose the cheque(s) with this application form.

### 3a Details of your Payments

You only need to complete this section if you are making regular or single payments to your plan. Otherwise go to Section 3b.

#### Regular Payments

1. Please state the regular **GROSS** amount you wish to pay into your plan. £

2. How often do you want to make the payments stated above?  Monthly **or**  Yearly

- You must make regular payments by Direct Debit.
- Regular monthly payments must be due on the same day each month. Regular yearly payments must be due on the same day and month each year.
- The amount you pay will be less than the gross amount that you have agreed to pay. This is because Standard Life reclaim basic-rate tax on your behalf. If you pay tax at the higher rate, you can claim the rest of the relief through your tax return.
- You can make occasional payments at any time. You can stop, restart, increase or decrease your payment at any time. You will not be charged for this.

3. Please choose a date for your first regular payment between the 1<sup>st</sup> and 28<sup>th</sup> of the month.  /  /  2 0

The first payment date must be a date after the date you submit the application form. If the due date falls on a weekend or bank holiday, your account will be debited within two working days. Depending on investments you have chosen to make regular payments into, your payments may not be invested into your chosen funds until later in the month.

#### Single Payments

If making a single payment please state the **GROSS** amount. £

Cheques must be for the **NET** amount (i.e. less basic rate tax) and made payable to Fidelity.

Please state the (**NET**) cheque amount. £

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90717

### 3e Source of Wealth and Occupation Details

Due to Financial Services Authority (FSA) requirements we are required to obtain information about the source of your payment before we can accept your application. Please indicate below how you acquired the money you are investing.

Salary/ Bonus	Compensation payment	Inheritance	Sale of company	Divorce settlement	Lottery/ betting win	Sale of investments	Gift	Savings	Policy claim/ maturity	Sale of property	Other (please give details)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If other, please specify

Occupation

What is your Gross Annual Income - please indicate which income band applies to you:

Under £10,000	£10,000 to £14,999	£15,000 to £19,999	£20,000 to £24,999	£25,000 to £29,999	£30,000 to £39,999	£40,000 to £49,999	£50,000 or more
<input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>	or <input type="checkbox"/>

### 3f Payment of Death Benefits

It is important for you to consider the death benefits available through your SIPP. Please speak to your intermediary for full details.

If you want one or more of your dependants to receive pension/lump sum benefits on your death, please speak to your Intermediary or call FundsNetwork on 08457 44 66 00 to request a copy of form FSIPP36 - Instruction for Payment of Death Benefits.

### 3g Direct Debit Instruction

Where there is more than one payer making a regular payment (employer or member) a separate Direct Debit instruction is required. Please photocopy this page of the Application Form, as necessary.

Complete the Direct Debit Instruction to instruct your bank/building society to make payments from your account. Please ensure that the instruction is signed and dated.

**Instruction to your Bank or Building Society to pay by Direct Debit.** Please pay Standard Life Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Standard Life and, if so, details will be passed electronically to my Bank/Building Society. Banks and Building Societies may not accept Direct Debit Instructions for some types of accounts.

Name(s) of Account Holder(s) — THIRD PARTY PAYMENTS ARE NOT ACCEPTED

Name and Address of Bank or Building Society

To: The Manager

Bank/Building Society Account Number

Branch Sort Code



Originator's Identification Number: 991524

Originator's Reference Number (Office Use Only)

Signature (YOU MUST SIGN & DATE HERE)

X

X

Date

 /  / 20

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Please Turn Over



# The SIPP

Please complete in BLOCK CAPITALS using BLACK INK.

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## 5. Commission and/or Fees for your Intermediary

### General Notes on Commission

You have a choice between fees, commission charges or a combination of the two.

- Initial Commission: we will take a charge of 0.1% for each 0.1% of commission we pay, up to a maximum of 5% of the total payment.
- Fund Based Renewal Commission: we will take a charge at a yearly rate of 0.01%, which will be deducted from your plan for every 0.01% of commission we pay up to a maximum of 0.5%.
- Fund Based Renewal Commission can continue after age 75 if you choose Alternatively Secured Pension (ASP).
- Funded Initial Commission: we will take a charge of 0.2% for each 1% of commission taken for 6 years.
- If Funded Initial Commission is selected and you buy an annuity or make a transfer payment within 6 years, a transfer charge will apply.
- Funded Initial Commission is not available if you are aged 69 or over.
- Funded Initial Commission is not available if the single payment(s) is under £10,000.
- Funded Initial Commission will always be paid as each transfer payment is received.

### 5a Commission and/or Fees for your Intermediary

If your Intermediary is **not** taking commission and/or fees please mark an X in the box  and go to section 6.

### Commission Types

#### Commission Mix Guidance Notes

Intermediaries can take a mixture of Initial Commission and Funded Initial Commission but please note that the maximum mix is 5%, of which Funded Initial Commission cannot exceed 3%.

Fund Based (Trail) Commission is automatically paid at the FundsNetwork default rates, in addition to all other options available.

Additional SIPP wrapper based renewal commission can be considered independently of any other commission types.

#### Commission Reminder

	Initial Commission	Funded Initial Commission
	Max 5% (steps of 0.1%, a one-off charge taken from your plan)	Max 3% (steps of 0.1%, a monthly charge taken from your plan for 6 years)

Fund Based (Trail) Commission	Fund Based Renewal Commission
If you have chosen FundsNetwork funds, your Intermediary will be paid Fund Based (Trail) Commission on a quarterly basis at the FundsNetwork default rates. Your Intermediary can give you more information about the commission payable on this investment.	Max 0.5% (steps of 0.1%, an annual charge) - this type of commission is taken on an ongoing basis, and is calculated on the total value of your SIPP.

Payment Types		% only	% only
		<input type="text"/>	<input type="text"/>
Payment Types	Transfer payment(s)	<input type="text"/>	<input type="text"/>
	Regular payment(s)	<input type="text"/>	Not available
	Your single payment(s)	<input type="text"/>	<input type="text"/>
	Your employer's single payment	<input type="text"/>	<input type="text"/>

Fund Based (Trail) Commission	Fund Based Renewal Commission
Standard FundsNetwork Trail	<input type="text"/>
Standard FundsNetwork Trail	<input type="text"/>
Standard FundsNetwork Trail	<input type="text"/>
Standard FundsNetwork Trail	<input type="text"/>

Fund Based Renewal Commission is available yearly or monthly. We will pay yearly unless specified. Please mark an X in the box if your Intermediary would prefer to receive monthly payments.

**Intermediary Fees**

Please indicate either a monetary or a percentage amount. If your Intermediary is VAT registered, remember to add the VAT amount.

Initial Fee  
 £  -  and/or  -  %  
 or

Yearly Fee  
 £  -  and/or  -  %

Frequency

Monthly  or Quarterly  or Half Yearly  or Yearly

How long do you want this paid for?

Lifetime of the plan  or Other (please specify term)  Years  Months  When do you want to start paying the fee?  /  / 2 0

All amounts are paid in arrears. If you want amounts paid in advance please notify us in writing.

**6. Important Notice, Declarations and Signature**

6a — Data Protection Notice — Important, please read

All parties on this form have a right to know that FundsNetwork and Standard Life hold personal data about them and what purposes it will be used for. Please give them an opportunity to read this notice.

- (i) The personal information which you (including all parties named on the application for this plan) provide to FundsNetwork will be passed to Standard Life and will be used by FundsNetwork, and Standard Life for the following purposes:
  - (a) to administer the SIPP for which you apply;
  - (b) to comply with legal and regulatory requirements;
  - (c) to identify you when you contact FundsNetwork or Standard Life;
  - (d) for internal analysis and research; and
 FundsNetwork and Standard Life may use external third parties to process such personal information on its behalf in accordance with these purposes.
- (ii) If your application does not proceed, the personal information you gave to Standard Life in relation to your application will be held on Standard's Life records for six years before it is deleted.
- (iii) FundsNetwork and Standard Life will keep the information you have supplied confidential, and will not disclose it unless it is lawful to do so.
- (iv) FundsNetwork and Standard Life may share your personal information with the following third parties:
  - (a) your Intermediary and any other party to the business relationship whom you tell us about (please notify FundsNetwork in writing if you no longer wish your personal information to be shared with any such party);
  - (b) other associated or affiliated FundsNetwork or subsidiaries of Standard Life plc for the purposes set out in this data protection statement;
  - (c) the Unclaimed Assets Register, in connection with the possible recovery by you of (for example) unclaimed distribution payments;
  - (d) other organisations for any of the following purposes: (i) compliance with any legal or regulatory requirements; (ii) to protect FundsNetwork and Standard Life and their customers from theft and fraud; and (iii) to take appropriate steps if FundsNetwork or Standard Life considers your levels of trading funds made available by FundsNetwork to be short-term, excessive or disruptive.
- (v) Except as outlined in (iv) above or otherwise required by law, your personal information will not be passed to anyone without your permission.
- (vi) To comply with Money Laundering Regulations, FundsNetwork or Standard Life may need to request additional evidence of identity from you, and may use a credit reference agency for this purpose (who will record that an enquiry has been made).
- (vii) Please note that the personal information which you provide will be processed by FundsNetwork and Standard Life or associated or affiliated companies which may be based outside of the EEA. This may involve the transfer of data by electronic media including the internet. Where your data is transferred outside of the UK, FundsNetwork and/or Standard Life will ensure that the recipient agrees to keep your information confidential and hold it securely in accordance with the requirements of the Data Protection Act 1998.
- (viii) If the application form in respect of your plan was completed on your behalf pursuant to a power of attorney, the personal information provided in respect of such power of attorney (including information about your mental health) may be processed by FundsNetwork and Standard Life and its associated and affiliated companies and held for the purpose of administering your plan.
- (ix) With limited exceptions, you may ask for a copy of the personal information which FundsNetwork and/or Standard Life hold on you. We are allowed by law to make a charge for this. If any of the information which we hold about you is incorrect, please tell FundsNetwork and it will be amended. You can write to us at FundsNetwork, Oakhill House, 130 Tonbridge Road, Hildenborough, Kent TN11 9DZ.
- (x) FundsNetwork and Standard Life may monitor and record your telephone calls to FundsNetwork and Standard Life for verification and training purposes.

**Future information sharing:**

We may, in future, be able to send you a yearly statement that shows both information about your state pension and the benefits you may get from this plan. To be able to do this, we would have to share the information set out in Part 1a of this form with the Department for Work and Pensions (DWP). We would not use this information for any other purpose.

If you want us to share this information with the DWP, you need take no action.

If you do not want us to share this information with the DWP, please mark an X in the box.

If you do not cross the box, you will have 30 days from the date you sign this form to change your mind before we may share information about you with the DWP. We may share information each year, as long as you are a member of this plan. If you decide later on that you do not want us to share this information with the DWP you can contact us as detailed in the "How to contact us" section of the Key Features.

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# The SIPP

Please complete in BLOCK CAPITALS using BLACK INK.

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## 6b Declaration & Signature — you must sign and date the form below

### Important notes

#### HM Revenue & Customs warning

This application will also be used as an application for tax relief at source. If you give false information you may be prosecuted.

#### Declaration by Standard Life

If Standard Life Assurance Limited accepts this application, it hereby agrees as administrator and provider in terms of the rules of the Fidelity Self Invested Personal Pension Scheme to administer the Scheme as required by the rules.

#### Your Declaration

- I, the person named in Section 1a of this application, request that the benefits described in or arising from payments specified in the application be provided for me under the Fidelity Self Invested Personal Pension Scheme, and in consideration of its acceptance I undertake to be bound in all respects by the rules of the Scheme in force from time to time.
- I declare that to the best of my knowledge and belief, the statements made in this application whether in my handwriting or not, are correct and complete.
- I declare that I have read the 'SIPP Terms and Conditions (FSIPP62)' and 'SIPP Key Features Document (FSIPP17)' and agree to be bound by them.
- I agree to my Intermediary receiving the fees and/or commission described in Section 5a.
- I have read and understood the Data Protection Notice contained in Section 6a. I agree that my personal data (including any sensitive data) may be used for the purposes described, (subject to me exercising my right not to be contacted with details of other products and services).
- I agree to the FundsNetwork client terms of business (FGEN02).

#### If I am applying to make a transfer payment

- I authorise Standard Life to ask for any details as they may require, regarding the transfer payment(s) detailed in Section 2 of this application and authorise the transferring scheme/insurer of the transferring policy to disclose this information.
- If this application includes a transfer of funds from another Registered Pension Scheme(s):- I instruct the named provider(s) to transfer the funds from the plan(s) listed to this plan. I discharge the transferring provider(s) of all liabilities under their plan(s) listed. I authorise the named provider(s) to release the necessary information to enable the transfer to take place.

#### If I am applying to make a regular payment or single payment(s)

- I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004 will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year (the 'basic amount' for the 2008/2009 tax year is £3,600 gross. This may change in future tax years).
- I declare that I will tell Standard Life if an event occurs (such as those listed in my Key Features Document FSIPP17) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the event occurs, or within 30 days of the event if this is later.

Signature (YOU MUST SIGN & DATE HERE - Please ensure all relevant sections are completed as per the instructions on this form)



Date

\_\_\_\_/\_\_\_\_/20\_\_\_\_

## 6c Money Laundering Regulations

To comply with Money Laundering Regulations 2007, FundsNetwork and/or Standard Life may verify your identity by carrying out an on-line check with a reference agency. Where an on-line check is carried out, the agency will verify your identity against public records and it will also check your credit history (but will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties. If the on-line check does not confirm your identity, FundsNetwork and/or Standard Life will carry out a manual check.

### Money Laundering Regulations section - For Intermediary use only.

#### Money Laundering Regulations

To comply with the Money Laundering Regulations 2007, a copy of an 'Intermediary Introduction Certificate for UK Resident Private Individuals' must be completed by your Intermediary.

Please confirm that you have completed a separate certificate for all parties to this contract by marking an X in the relevant box.

YES

NO

or

Please contact FundsNetwork on 08457 44 66 00 to request additional copies of this form.

Please send your completed form to your Intermediary or to Fidelity International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.

This application form is issued by Standard Life. Standard Life is authorised and regulated by the Financial Services Authority. FSIPP30a

If you have any queries about this form please ask your Intermediary or ring FundsNetwork's ServiceLine on 08457 44 66 00.

The FundsNetwork service is offered and managed by Financial Administration Services Limited. The FundsNetwork SIPP is provided and administered by Standard Life Assurance Limited.

Financial Administration Services Limited (a Fidelity International Group) is registered in England and Wales (No. 1629709) Registered office Oakhill House, 130 Tonbridge Road, Hildenborough, Tonbridge, Kent, TN11 9DZ. Standard Life Assurance Limited is registered in Scotland (SC286833) Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH. Both companies are authorised and regulated by the Financial Services Authority. Calls may be recorded and monitored to help improve customer service.

### The Direct Debit Guarantee

**Important: Please tear off and keep safely.**

- This guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the scheme is monitored and protected by your own Bank or Building Society.
- If the amounts to be paid or the payments dates change Standard Life will notify you 5 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Standard Life or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time, by writing to your Bank or Building Society. Please also send a copy of your letter to us.

