

Who this form is for

This form is for investment in the Standard Life International Bond by:

individuals who want to make an additional investment

or

trustees of an existing trust who want to make an additional investment*

or

trustees of a new gift plan where an existing bond has been transferred to that trust and the trustees are making an additional investment at the same time.

This form should only be used if the bond holder details and financial adviser details have not changed. If these details have changed or you want to use the phased investment option, you should complete the relevant full International Bond Application form.

* Trust investment:

Additional investments to an existing bond and/or recurrent single payment are only available if you have a Gift Plan, or Loan Plan. Additional payments cannot be made to a Discounted Gift Plan. If your trust was set up using a Standard Life trust deed, please note the trust is registerable and should be kept up to date on HMRC's Trust Registration Service (TRS) as well as the Irish Revenue's Central Register of Beneficial Ownership of Trusts (CRBOT). However, the CRBOT registration process is being updated and the Irish Revenue will update their website when it's available. There will be no penalty for non-registration whilst this work is carried out. If your trust was not set up using a Standard Life trust deed, please check with the solicitor who drafted the trust as to its registration. Once the CRBOT has been updated, we'll require to see the proof of registration document before carrying out certain transactions.

If you want to start taking withdrawals, or want to increase the amount you are already taking, you will need to complete our 'Instruction to take regular withdrawals or cash in all or part of your International Bond' form (IB30SUR).

IB31 0424



This application is only for use by applicants who are habitually resident in the UK, Channel Islands or the Isle of Man. Please ask your financial adviser if you require any guidance.



Call **0345 300 4273**.
Calls may be monitored.

Filling in this form

You should remember that your financial adviser is acting on your behalf, not only by giving you advice, but also regarding completing this form.

Please use BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to correct an error, please initial any changes.

All relevant sections of the application form must be complete and applicable documents attached for the payment to proceed.

We will use the information provided on this application form before taking information from any attached illustration. A copy of the completed application form will be sent to you on request.

Before completing this form, please ensure you have read the Key Features Document and the Key Information Document (KID), and where relevant, the appropriate Supplementary Information Document (SID) or Key Investor Information Document (KIID).

Please send the completed application form, supporting documents and any cheque payments to us at this address:

Standard Life International Scanning Unit
Standard Life House
30 Lothian Road
Edinburgh EH1 2DH
(Only email documents if requested.)

Avoiding delays – checklist	
The sections listed below may not need completed for all applications. However, any missing information relevant to <i>your application</i> will cause a delay.	
Part 2 – Source of Wealth	The section has been fully completed <input type="checkbox"/>
Part 7 – International Bond Bank Account	Assign money to the IB Bank Account <input type="checkbox"/>
Part 8 – Investment Funds	Citi codes and/or insured fund codes (www.standardlife.co.uk/adviser) <input type="checkbox"/> Investment total 100% including IB bank account <input type="checkbox"/>
Parts 9 to 12 – Adviser charges	Completed for this investment <input type="checkbox"/>

Part 1 – Details of your investment	
Name of first bond holder	<input type="text"/>
Bond number:	I B <input type="text"/>

Additional payments cannot be made to a Discounted Gift Plan.

Part 2 – Source of Wealth	
We will not be able to proceed with your application unless the information requested here is fully completed.	
Annual income before taxation	
Please indicate which income band applies to you (if this is a joint application please state the combined income of the bond owners).	
Under £20,000 <input type="checkbox"/>	£20,000 to £39,999 <input type="checkbox"/>
£40,000 to £59,999 <input type="checkbox"/>	£60,000 to £89,999 <input type="checkbox"/>
£90,000 or more <input type="checkbox"/>	
Please tell us how you acquired the money you are investing, cross all that apply . Provide additional details for all completed boxes in the free text box below.	
Compensation payment <input type="checkbox"/>	Sale of investments <input type="checkbox"/>
Inheritance <input type="checkbox"/>	Savings <input type="checkbox"/>
Salary/bonus <input type="checkbox"/>	Sale of company <input type="checkbox"/>
	Policy claim/maturity <input type="checkbox"/>
	Existing trust <input type="checkbox"/>
	Sale of property <input type="checkbox"/>
	Other <input type="checkbox"/>
Additional details (must be completed):	<input type="text"/>
Failure to complete this section fully is the most common cause of delay in processing the application. To help: Provide evidence where possible – documents/internet links /etc. Use the free text box to provide as much information as possible.	



Under Anti-Money Laundering regulations, Standard Life International is obliged to gather information on the origin of the funds being invested and on how the wealth leading to the investment was acquired.

In some cases, we may require documentary evidence to verify the information supplied in this section.

Please continue on a separate piece of paper if necessary.

Part 5 – Recurrent single payment - Direct Debit Instruction (Not available on Loan Plans, Flexible Reversionary Plans or Discounted Gift Plans)

If you are investing with a discretionary investment manager the minimum amount may be different.

Completion of your direct debit instruction

1. Complete this form to instruct your bank/building society to make payments directly from your account.
2. If the due date falls on a weekend or bank holiday, your account will be debited within two working days.
3. Please ensure that the instruction is signed and dated and the direct debit guarantee is detached before the instruction is returned to Standard Life International.

Instruction to your bank or building society to pay by direct debit

Issued by: Standard Life International,
90 St Stephen’s Green, Dublin 2

Service user number

2 7 0 2 6 1



For Standard Life official use only

This is not part of the instruction to your bank or building society.

Name and full postal address of your bank or building society branch.

										Postcode	

Name(s) of account-holder(s)

Bank or building society account No.

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Reference number

--	--	--	--	--

Branch sort code

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Please refer to the top right hand corner of your cheque book.

Your instruction to the bank/building society, and signature

Please pay Standard Life International 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 International and, if so, details will be passed electronically to my bank/building society.

Signature(s) ▶

Date (DD/MM/YYYY)

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Signature(s)

Banks and building societies may not accept direct debit instructions for some types of account.

We may request a copy of your bank statement prior to paying money to the stated account.

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Standard Life International will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Standard Life International to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Standard Life International or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Standard Life International asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Part 6 – Your choice of investments

You can choose to invest in Standard Life insured funds, mutual funds, whole of market funds, the Elevate GIA and deposit/structured deposit accounts. You can also choose to direct us to invest with a discretionary investment manager who will manage the investments.

Note that:

If you choose to only invest in Standard Life insured funds, you don't need to allocate part of your investment to the IB bank account. All charges and withdrawals will be applied by cancellation of units from those funds.

If part or all of your investment is to be invested in any type of investment other than insured funds, you **must** allocate part of your investment to the IB bank account.

Please note that we are not responsible for and nor do we guarantee the suitability or tax/regulatory/legal treatment of the bond, and it is your responsibility to ensure it remains suitable for your purposes. We are not authorised to give you tax or legal advice and so recommend you take your own independent advice.

All investment choices are made at your own risk, so it's important to seek the appropriate financial advice.

Standard Life International is not responsible for the performance or solvency of the providers of the investments available through the International Bond.

It is important to understand that your Bond is not protected by the UK Financial Services Compensation Scheme (FSCS) if we are unable to meet our liabilities to you. There is no access to the FSCS if you have a pre-existing International Bond or plan to take out an International Bond in the future. Please refer to your key Features for more information.

Please give the percentages that you wish to invest in each investment option. Use whole numbers only and check that the total adds up to 100%. Remember to include any percentage invested in the IB bank account in the total percentage to cover charges and withdrawals.

If the amounts do not add up to 100% ALL the money will be invested in the IB bank account until you give us clear investment instructions for the whole amount.

Before signing your application please review against the avoiding delays checklist on page 2.

Part 14 – Bond owner(s), trustees and powers of attorney signatures	
Person 1	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	
Person 2	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	
Person 3	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	



If there are more than three signatories please photocopy this page.



Signature(s)



Signature(s)



Signature(s)

Data Protection Notice

Data Protection Notice – Using your Personal Information

We're committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers' personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information. You can get a copy of our Privacy Policy on our website: www.standardlife.ie/privacy

If you're providing information about another person, we encourage you to inform the individual that you have provided this information and suggest they read our privacy policy to understand how we manage and use their data.

Standard Life International dac is authorised and regulated by the Central Bank of Ireland. Standard Life International dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

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Standard Life International dac is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, D02 F653.

www.standardlife.co.uk/international-bond

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