

# Active Money Self Invested Personal Pension

## Application form

Internal Drawdown transfers from a Group Plan or an Executive Pension Plan

## Who this form is for

You should use this form if you wish to transfer a Drawdown Pension Fund from your Standard Life Group Plan or Executive Pension Plan into our Active Money Self Invested Personal Pension (Active Money SIPP) for drawdown purposes.

In addition, the following forms should be completed, where applicable:

SLSIP30 Active Money SIPP application form (for transfer, single or regular payments).

You should complete form SLSIP30 for any transfer payment that does not represent a Drawdown Pension Fund.

## Filling in this form

If you are receiving advice from a financial adviser you should remember that the financial adviser is acting on your behalf not only by giving you advice, but also regarding the completion of this form.

By filling in this form, you are applying to enter into a contract with Standard Life. Until your application is accepted, Standard Life's liability is limited to the return of the transfer payment to the person making the payment. We will provide you with a copy of this form and the terms and conditions of the contract on request.

Please fill in this form in black ink and BLOCK CAPITALS. Don't use correction fluid if you make a mistake. If you need to fix a mistake, please initial any changes you make.

Put a cross in the relevant box when you're asked to make your choice.

## Part 1a – Planholder's details

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

Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)					Male	Fem	iale 🗌
Surname							
First name(s) in full							
Date of birth (DD/MM/YYYY)							

## **SLSIP37 1023**



When we refer to 'Standard Life' in this document we mean Phoenix Life Limited trading as Standard Life.

If you complete this form and form SLSIP30, we will set up only one plan for you. But we will put different payments (or different parts of a payment) into separate arrangements under the plan.

SLSIP	37
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Part 1a – Planho	lder's	detai	ls (co	ntinı	ıed)	)	÷								ľ					
Address																				
House number																				
Street																				
City/Town																				
County																				
Postcode																				
National Insurance Number																				
Telephone (include	e area di	alling	code)																	
Home																				
Business																				
Mobile																				
E-mail address																				
(	@																			
Marital status	_						_	-											_	_
Single	e 🔲 I	Marrie	ed/Civ					]						ving						
				Se	epar	ated			)ivo	rce	d/d	SSO	lve	d civ	/il p	art	ner	ship	٥L	
Do you have a Stan	idard Lif	e SIPF	p?										Yes		]			No		
If <b>'Yes'</b> , insert plan r	numbert	then g	o to <b>Pa</b>	art 1b	. lf '	No',	ans	wer	the	que	esti	ons	bel	ow t	the	n go	o to	Pa	rt 11	D.
Plan number	D 1																			
At what age are you	u planniı	ng to l	ouy an	annı	uity?										ŀ	٩ge				
We need to use this (for example, becau default age of 75 wl	use you a	are no	t plan															a		
Are you currently																				
Employed	d 🗌		S	Self ei	mplo	oyed								Ν	lot	em	plo	yec		
Carer for a persor under age 16			Full ti	me eo	duca	ation		]								Per	nsio	one	r 🗌	
Carer for a persor over age 16				ι	Jnde	er 16		]									0	the	r 🗌	
lf other, please specify																				

## Part 1b – Eligibility

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

Are you resident in the UK? (see Note A in Part 7)

Are you a Crown servant performing duties abroad, or the husband, wife or civil partner of such a Crown Servant? (see Notes B&C in Part 7)

**Go** to **Part 1c** if you have answered **'Yes'** to either of the above questions.

**Stop** if you have answered **'No'** to both of the above questions – you cannot normally apply for this plan. Please speak to your financial adviser.

## Part 1c - Financial Adviser details

This part should b	be completed by your financial adviser.
Contact name	
Telephone number	
Mobile Number	
Business writer name(s)	
Agency code	
Agency name	
Intermediary reference number	
E-mail address	
	@

SLSIP37

You may still be eligible to make a transfer payment from a UK registered pension scheme if you are transferring from another Standard Life pension plan and you are habitually resident in a European country. Please speak to us or your adviser for more information.

(i)

Yes

Yes

No

No

This part should	be completed by your financial adviser.		Please place cross in box.
1. Basis of sale	Whole of market	Other 🗌	
lf other, please specify			
financial advice	nis client has been provided with e, including a personal recommendation tion and investment choice.	No Please see 'Advice not given' side note.	Advice not given – If your client has not been provided with advice and would like immediate drawdown they
requirements to b of a genuinely co will be an approp	Adviser Charges paid from this pension plan meet the HMRC be authorised member payments and therefore will be as a result mmercial remuneration arrangement I have with the planholder, riate amount for the advice or services provided and will only be ices given in relation to this pension plan.	side note.	cannot use this form. Please ask your client to contact Standard Life to proceed with this transaction.
Company Stamp			Please note: the company stamp box must be stamped.
piece of business transfer business	is part, you are confirming that you are taking responsibility for subr s for your client. (Please note that we will return any form containing s if you do not complete this part.) s of the plan from which you are transferring		Transfer payments can be made by BACS, cheque or
piece of business transfer business	for your client. (Please note that we will return any form containing if you do not complete this part.)		
piece of business transfer business Part 2 – Details Plan number of the transferring scheme HM Revenue & Customs Pension Scheme	for your client. (Please note that we will return any form containing if you do not complete this part.)		made by BACS, cheque or telegraphic transfer. Your <b>'plan number'</b> is available from your previous employer or pension manager and is normally shown on your annual
piece of business transfer business <b>Part 2 – Details</b> Plan number of the transferring scheme HM Revenue & Customs Pension Scheme Tax Reference	s of the plan from which you are transferring		made by BACS, cheque or telegraphic transfer. Your <b>'plan number'</b> is available from your previous employer or pension manager and is normally shown on your annual
piece of business transfer business Part 2 – Details Plan number of the transferring scheme HM Revenue & Customs Pension Scheme Tax Reference Benefits taken Amount of tax-free	s of the plan from which you are transferring		made by BACS, cheque or telegraphic transfer. Your <b>'plan number'</b> is available from your previous employer or pension manager and is normally shown on your annual
piece of business transfer business Part 2 – Details Plan number of the transferring scheme HM Revenue & Customs Pension Scheme Tax Reference Benefits taken Amount of tax-free My remaining fun	e lump sum	pension	made by BACS, cheque or telegraphic transfer. Your <b>'plan number'</b> is available from your previous employer or pension manager and is normally shown on your annual
piece of business transfer business Part 2 – Details Plan number of the transferring scheme HM Revenue & Customs Pension Scheme Tax Reference Benefits taken Amount of tax-free My remaining fun If 'No', please sto	e lump sum d was designated to provide a Drawdown Pension Fund Yes	pension	made by BACS, cheque or telegraphic transfer. Your <b>'plan number'</b> is available from your previous employer or pension manager and is normally shown on your annual

## Part 3 – How you want to pay your adviser

Please tell us what you want to pay from your plan to your financial adviser. We will use the information you provide in this section to pay your financial adviser. By signing the declaration in Part 6e of this form, you are:

- agreeing to the payment of the adviser charges documented below, and
- authorising Standard Life to accept all future instructions from your adviser for payment of adviser charges that you have agreed to pay them from your plan.

## You do not need to complete the information in Parts 3a or 3b if:

- this application is being made via Standard Life Direct, or
- your financial adviser is billing you directly for their services, or
- your financial adviser is not charging you for their services.

If any of these three options apply, cross this box and then go to Part 4.

### Part 3a – Adviser charge for transfer payment

Complete this section if you have agreed an initial charge for advice with your adviser. It will be deducted once the transfer payment is processed.

Please state the amount of Initial Adviser Charge as either a monetary amount or percentage of that payment.

OR

%

£

Transfer payment

## Part 3b – Ongoing Adviser Charge

Complete this section if you have agreed to pay your adviser for ongoing advice in relation to your plan. The Ongoing Adviser Charge can either be a set amount or a percentage of your plan value.

1. Set amount				
f	every month	£		every year
£	every quarter	£		every half-year.
OR				
2. Percentage of plan value		•	% of your plan va	alue a year
This percentage can be taken	once a year or s	plit across a	a different time per	iod:
Yearly	Monthly [		Quarterly	Half-yearly 🗌

We call this an Initial Adviser Charge.

We call this an Ongoing Adviser Charge.

## Part 4

Complete this section to tell us where you wish to invest your payment

Please ensure that the total percentage adds up to 100% or the total payment.

Please use Note D in Part 7 to help you complete these sections.

Where you're investing in the Standard Life Investment Policy and Additional Investments, we will make any Additional Investments you have instructed us to make, as and when there is enough money in the SIPP Bank account. **Unless you instruct us otherwise, we will invest your payment in the amounts or percentages shown below.** If there are not enough funds to carry out your instructions, we will contact your financial adviser.

## Part 4a - Pension funds (Standard Life Investment Policy) - Level 1

Fund code	Standard Life Investment Policy (fund names)		Transfer Payment £ or %
FA	PENSION MANAGED ONE FUND	EXAMPLE	

account, Mutual Funds, or any other investment. If you also want to invest in the SIFF Bank you cannot choose any other investments. You also cannot invest in more than one Investment Pathway Fund at a time. The total percentage(s) including the Trustee Cash Account if chosen below should add up to 100%.

## Part 4b – SIPP Bank Account – also used to pay income drawdown and charges

	Transfer payment £ or %
How much do you want to invest in the SIPP Bank account?	

It is important that you have enough money in the SIPP Bank Account to pay any advice charges you want paid from it, as well as any charges for investments outside of the SLIP funds.

We will hold back an amount in the SIPP Bank Account instead of investing it in accordance with Parts 4c to 4g. The amount that we will hold back is the total of:

- The adviser charges described in Part 3 that are due to be paid in the next 12 months
- 12 months of the income selected in Part 5a
- The 'yearly administration charge' that's due in the next 12 months
- If you choose level 3 investments, the 'initial administration charge', the 'pension fund withdrawal set up charge' and the 'yearly charge for pension fund withdrawal'
- If you complete Part 4e, the 'investment manager charge'

## IJ

IMPORTANT:

Please note that the **fund code**(s) and the FULL **fund name**(s) must be included on this form, as shown in the example opposite, in order for us to process your application. If we do not have this information we may have to return your application.

The Pension Funds are the funds available through the Standard Life Investment Policy.

For further information on the investments available to you, please refer to the 'Client Investment Options Guide (SLSIP5a)'.

#### **SIPP Bank account**

There is no additional charge for any money invested in this account. The rate of interest is normally 1% below the Bank of England base rate. You can check the rate by contacting us or your adviser.

#### **Completing Part 4: Reminders**

- The total amount you have invested, throughout this section, should add up to 100% or be broadly equal to the amounts (£s) shown in this form. To ensure we can process your application effectively and efficiently, please check your totals before submitting the application to us.
- Please ensure you have set aside enough money in the SIPP Bank Account to carry out any instructions in Parts 3 and 4 (if applicable).

### Part 4c - Additional investments

Please note: Additional investments usually incur additional charges.

- If you choose to invest in anything other than our range of SLIP pension funds we refer to this
  as an additional investment. This includes all the mutual funds managed by Standard Life
  Investments. When you choose to invest in additional investments, the length of time it takes
  to complete the purchase or sale of your chosen investment will vary depending upon the type
  of asset and the organisation providing it. We will do our part of any such transaction within
  a reasonable timescale but we do not control the amount of time it might take a third party to
  complete the purchase or sale. If you would like to know more, please call our SIPP Customer
  Centre on 0345 0845 000 (call charges may vary).
- If there isn't enough space in these sections to capture all your requirements, please copy this page or use a separate sheet of paper and attach it to this form.
- If you are investing any money in additional investments, remember to set aside enough money in the SIPP Bank account to pay for charges.

## SIPPZone mutual funds – Level 2

• Please complete the question and table below to tell us how you wish to invest your payment.

- A European Union directive requires fund managers to produce a Key Investor Information Document (KIID) for most funds. This document sets out key information about the fund including the objectives and risks of the fund, what it invests in and its charges.
- It is important that you read the KIID before selecting the fund.

For income funds do you wish the income to be paid into the SIPP Bank Account? Yes

Citicode	Mutual funds from SIPPZone		Investment priority order (1-10)	£ or %
ХХОО	Standard Life INVESTMENTS MANAGED	EXAMPLE		

## (I) IMPORTANT:

No

Please note that the citicode(s) and the FULL fund name(s) must be included on this form, as shown in the example opposite, in order for us to process your application. If we do not have this information we may have to return your application.

For a list of funds please go to **www.standardlife.co.uk**.

Part 4d – Managed Portfolio Serv	ice – Level 3	
Only complete this section if you wi Aberdeen Standard Capital.	sh to invest in the Managed Portfolio Service provided by	
Please cross one box below to indic	ate which Portfolio Strategy you wish to invest in.	Ther
Portfolio Strategy 1		inves £100
Portfolio Strategy 2		Portf
Portfolio Strategy 3		
Portfolio Strategy 4		
Portfolio Strategy 5		

## Part 4e - Discretionary Investment Manager - Level 3

Only complete this section if you wish to appoint a Discretionary Investment Manager. You can only select **ONE** Discretionary Investment Manager from the two options below.

1. Name	Aberdeen Standard Capi	tal			
2. How much do yo	ou wish us to send?	£	•	OR .	%
Or complete this s	ection to choose another I	Discretionary Investme	ent Manag	er from our pane	el
1. Name					
2. How much do yo	ou wish us to send?	£	•	OR .	%

Part 4f – Execution-only stockbroker – Level 3									
Only complete this section if you want to appoint an Execution-only stockbroker.									
<ol> <li>Who will be the only person allowed to instruct your Execution-only stockbroker to carry out a trade?</li> </ol>	Your financial adviser	or	You (the planhold named in Part 1)	er					
2. Do you want to include Internet Sharedealing? Yes No									
If 'Yes', please provide the email address	of the person who	is allowed	to instruct trades:						
@									
3. The person in question 1 will be able t Cross this box if you want <b>both you an</b> transactions on your account.		· · · · · · · · · · · · · · · · · · ·							

There's a minimum investment level of £100,000 into the Managed Portfolio Service.

There's a minimum investment level of £500,000 to appoint Aberdeen Standard Capital as your Discretionary Investment Manager.

2. This amount is a one-off payment. Regular payments cannot be sent automatically, but you can instruct us to pay additional amounts at any time.

Please make sure you set aside enough money in the SIPP Bank account to cover the adviser charges in Part 3.

An Execution-only stockbroker carries out trades on your, or if you prefer, your financial adviser's instructions.

## Part 4g - Any other investments - Level 3

In the investment details section, give all the relevant information where applicable, such as:

- details of fund(s) to be bought direct from the market
- type of share class accumulation or income, or
- details of the commercial property you want to buy.
- If there is not enough room for your needs, please attach a separate sheet(s) of paper.

#### Other providers forms

When an application form or prospectus is required, please provide the necessary form. Once we have completed the form, we will send it direct to the product provider with the appropriate amount of money. There may be a delay in carrying out any investment instructions until all documentation has been received.

#### **Commercial property**

If you wish to invest in commercial property, please attach the property information questionnaire (SLSIP83) along with this application.

Investment details	Investment priority order (1-10)	Transfer payment £ or %
<u> </u>		
1		
1		
1		
1		
L		

Property can be difficult to sell so it may not be possible to sell investments when required. The valuation of property is generally a matter of opinion rather than fact.

## Part 5

#### Taking your income

Please note: this section does not include the option to buy an annuity. If you wish to buy an annuity please call or write to us with your requirements.

If you wish your income to be paid to an overseas bank account, or if this form cannot capture your requirements, then please give us separate signed written instructions.

Part 5a – Protection from the Lifetime Allowance
Have you registered or applied for (do not tick any boxes if you have <b>NOT</b> registered or applied for protection):
Primary protection Enhanced protection Fixed protection 2012
Individual protection 2014 Fixed protection 2014
Individual protection 2016* Fixed protection 2016*
Please forward a copy of any certificate(s) or letters you have received from HM Revenue & Customs.
* Some levels of protection can be completed online, meaning you might not have received a certificate or letter in writing. If you have a certificate or reference number from an online application, please provide it in the boxes below:
1. When do you want to take your first (income) payment: (between 1 <sup>st</sup> & 28 <sup>th</sup> ) (DD/MM/YYYY)
2. How much income do you want before tax?
A year <b>f</b>
3. How often would you like to have your income paid (subject to minimum and maximum limits)?
Once a month 🔲 Once every 3 months (quarterly) 🗌 Once every 4 months (termly) 🗌
Once every 6 months Once a year

parts 2 and 3 of a P45 or a tax coding letter from HM Revenue & Customs. If this is not received we will apply emergency tax to the income payments.

Please include

To find out the income limits that apply to you, please speak to your financial adviser.

## Part 5b – Which investments do you wish us to provide your income from?

1. Do you wish us to provide income from any Standard Life Investment Policy funds?

If '**Yes**', go to question 2. If '**No'**, go to **Part 5c** and we will provide all the income from the SIPP Bank account.

2. Do you want to provide ALL this income by taking money proportionately across all your Standard Life Investment Policy funds? Yes

If 'Yes', go to Part 5c. If 'No', answer question 3.

3. How do you wish this income to be provided? (Please complete the table below)

Fund code	Standard Life Investment Policy (fund names)	Income (%)
FA	PENSION MANAGED ONE EXAMPLE	
	Total % invested in the SIPP Bank Accoun	t %
	Total (Please ensure the total percentage adds up to 100%)	) 100%

If you want us to provide any income from the SIPP Bank Account, and you wish to take this immediately, please ensure you set aside enough money to maintain 12 months' income

2. If you have answered 'No', please tell us what percentage split you wish to provide from the SIPP Bank Account.

## (I) IMPORTANT:

Yes L

No

No L

Please note that the **fund code**(s) and the FULL **fund name**(s) must be included on this form, as shown in the example opposite, in order for us to process your application. If we do not have this information we may have to return your application.

#### SLSIP37

Part 5c – Accou	nt details	í
To enable us to pa	ay any benefits, please provide your bank/building society details below.	Please check with your bank/building society that
Name of bank/ building society		CHAPS payments can be accepted into your account.
Address		
Building number		
Street		
City/Town		
County		
Postcode		
Bank or Building Society Account No.	Branch Sort Code	You will find this information on your cheque book or ATM
Name of account/ roll number to be credited		card (cash machine card).
to credit the soci	iety's own bank details: With some building society accounts we are required ety's own bank account and they then credit your personal account. Please uilding society to see if this is necessary. If it is, then please ask them to ing information:	
Account number/ roll number	Branch Sort Code	
Building society name		

## Part 6a - Data Protection Notice - Important, please read

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: https://www.standardlife.co.uk/privacy

#### Part 6b - Money Laundering Regulations

To comply with Money Laundering Regulations, we may verify your identity, by carrying out an online check with a reference agency. Where an online check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it 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 online check does not confirm your identity, we will carry out a manual check and we may need to contact you for further information. We regret we cannot offer any alternative process.

Acceptance of this application is subject to satisfactory completion of identity verification checks within 30 days of the application date.

#### Part 6c - Authorising your financial adviser to give investment instructions on your behalf

# If you want your financial adviser to be able to give investment instructions to Standard Life on your behalf, sign and date this section.

I authorise Standard Life to accept instructions from the financial adviser named in Part 1c to buy or sell investments under my plan. This authorisation will apply until Standard Life receives a written instruction from me changing or withdrawing my authorisation.

Signature		
Date (DD/MM/YYYY)	Si	gnatu

## Part 6d - Declarations - Important, please read

#### Important information

#### HM Revenue & Customs warning

If you give false information you may be prosecuted.

#### **Declaration by Phoenix Life Limited**

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

#### **Your declaration**

- 1. I, the person named in Part 1a of this form, understand that if I change my mind about continuing income drawdown under the Standard Life SIPP, I must:
  - buy an annuity under the SIPP with Standard Life, or
  - buy an annuity under the SIPP with another insurer of my choice, or
  - ask the SIPP administrator to pay my Drawdown Pension Fund to another scheme operating income drawdown of my choice (other than the scheme in Part 2 of this application form).
- 2. I request that the benefits described in or arising from the payment specified in the application be provided for me under the Standard Life 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.
- 3. 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.
- 4. I agree to be bound by the SIPP Terms and Conditions, and the terms and conditions for paying adviser charges.
- 5. I understand that I can access the Key Investor Information Documents (KIIDs) for my chosen funds (where available) from the **standardlife.co.uk** website or by calling Standard Life.
- 6. I request the trustee to appoint the investment manager(s), if any, named in Part 4e of this form.
- 7. I agree to my financial adviser receiving the adviser charges described in Parts 3a and/or 3b.
- 8. I have read the Data Protection Notice and I agree that my personal data may be used for the purposes described (subject to me exercising my right not to be contacted with details of other products or services).



## Part 6d – Declarations – Important, please read (continued)

#### My declarations to the administrator of the transferring scheme named in Part 2

- 9. I authorise and instruct you to transfer funds from the plan as listed in Part 2 directly to Standard Life. Where you have asked me to give you any original policy document in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer listed in Part 2 of this application.
- 10.1 authorise you to release all necessary information to Standard Life to enable the transfer of funds to Standard Life.
- 11. I authorise you to obtain from and release to the financial adviser named in this application any additional information that may be required to enable the transfer of funds.
- 12. If an employer is paying contributions to the plan as listed in Part 2, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan.
- 13. Until this application is accepted and complete, Standard Life's responsibility is limited to the return of the total payment to the administrator of the transferring scheme.
- 14. Where the payment made to Standard Life represents all of the funds under the plan listed in Part 2, then payment made as requested will discharge the administrator of the transferring scheme of all claims and responsibilities in respect of the plan listed.
- 15. Where the payment made to Standard Life represents part of the funds under the plan listed in Part 2, then the administrator of the transferring scheme will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment.

My declarations to Phoenix Life Limited and the administrators of the transferring schemes

16.1 promise to accept responsibility in respect of any claims, losses and expenses that Standard Life and the administrator of the transferring scheme may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

## Part 6e – Your signature

It is a serious offence to give false statements. The penalties are severe and could lead to prosecution. 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.

Please now sign the form. Your financial adviser will complete the money laundering section.

Signature Date (DD/MM/YYYY)



## Part 7 – Notes

- A. 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.
- B. 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.
- C. A civil partnership is a legal contract between two partners of the same or opposite sex.
- D. The SIPP Bank Account and Additional Investments

The SIPP Bank Account is a bank account owned and used by Standard Life Trustee Company Limited, the scheme trustee.

'Additional Investments' includes anything that is not invested in our Standard Life Investment Policy, e.g. the mutual funds available from Standard Life, SIPP Bank Account, commercial property, collectives and many other types of investments. If you want more information on what types of investments are available, please speak to your financial adviser.

When making 'Additional Investments' under the Active Money SIPP, we will place this money into the SIPP Bank Account. This account can be used to provide:

- any money required to purchase any investments.
- any money that is required to pay any charges.
- an investment opportunity or a facility to maintain cash on deposit.
- any income required immediately.

#### Other provider's forms

To enable us to make any 'Additional Investments' you must tell us the full name of the investment you wish to purchase, the provider's name and specific amounts you wish to invest. If you want to invest in any other insurance company's product where a formal application form is required, we will need a blank application form (from that provider), along with this completed application form, so we can carry out your instructions. Once we have completed the form, we will send it direct to the product provider with the appropriate funds. There may be a delay in carrying out any investment instructions until all documentation has been received.

#### **Commercial Property**

If you wish to invest in commercial property, please provide details in the 'other investments' section and attach the property information questionnaire along with this application. Property can be difficult to sell so it may not be possible to sell investments when required. The valuation of property is generally a matter of opinion rather than fact.

#### **Important Notes:**

- Please ensure you set aside enough money in the SIPP Bank account for your purposes.
- We will process the transfer payment as per the instructions you have given in the application form. Where we cannot achieve this we will contact your financial adviser.
- To tell us which order we should make your 'Additional Investments' in, complete the 'Investment Priority' column (1 being the investment you wish us to make first).
- If at any time you wish us to change the priority of your investments or change your investment instructions, please advise us in writing.
- As we do not know when money will be available we cannot guarantee any asset or fund prices.

## **Money Laundering**

#### For financial adviser use only

## Part i - Money Laundering Regulations

To comply with Money Laundering Regulations, Part ii must be completed by your financial adviser. They must also complete Part iii.

## Part ii - Identity of applicant verified (to be completed by your financial adviser only)

I/We confirm that the identity of the applicant has been verified.

- The information in section 1a was obtained by me/us in relation to the customer, and
- The evidence I/we have obtained to verify the identity of the customer exceeds the standard evidence set out within the guidance for the UK Financial Sector issued by JMLSG.

Please cross the box.

## Part iii - Financial adviser's details

If Part ii has been original document	completed this section must be signed by the person who has seen the tary evidence.	
Name of Regulator FCA or authorisation number		
Name		
Position		
Signed <b>•</b>		
Date (DD/MM/YYYY)		Signature required
Company Stamp		Please note: the company stamp box must be stamped.

## Active Money Self Invested Personal Pension

Standard Life u	se only										
Account Manager											
Sales Team Code											
Consultant code											
To comply with money laundering regulations you need to send the completed form 'Confirmation of verification of identity – private individual' with this application.											

#### www.standardlife.co.uk

Phoenix Life Limited, trading as Standard Life, is the provider and scheme administrator of the Standard Life Self Invested Personal Pension Scheme, and Standard Life Trustee Company Limited is the trustee.

Phoenix Life Limited is registered in England and Wales (1016269) at 1 Wythall Green Way, Wythall, Birmingham, B47 6WG. Phoenix Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Standard Life Trustee Company Limited (SC076046) is registered in Scotland at Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH.

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