

Who needs to complete this form?

You should complete this form if you are taking out a new Variable Protection Plan or Homeplan.

- If the plan is in your own name(s) then you need to complete this form.
- If the plan is held in an absolute trust then each beneficiary should complete this form.
- If the plan is held in trust and this trust is a discretionary or a flexible trust, then the settlor should complete this form.

Before completing this form, it's important that you read the important information at the end. These will give you all the information and help you need in filling this form in.

We strongly recommend that you speak to your tax adviser before completing this declaration.

Please complete all sections and sign the declaration on the form.

GEN1807 1221



A **qualifying policy** is a life assurance policy with tax advantages. When a qualifying policy comes to an end it's usually not subject to income tax or capital gains tax.

Qualifying policies include those that you have with us and those with other companies.

The **date of risk** is the start date of your plan.



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

Where there's more than one plan owner or beneficiary, please tell us the proportionate share of your rights under the plan. For example, a joint life plan is normally 50% for each owner.

This includes plans held in your name or held in a trust.

Please read the **Important information** at the end of this form for more information about what the payment limit is.

Your Personal Details

Plan number

Date of risk
(DD/MM/YYYY)

Full name

Full postal address

House number

Street

Town/city

County

Postcode

Date of birth
(DD/MM/YYYY)

National

Insurance Number

Phone number
(including STD code)

email address

% Proportion/Share held

Are you the sole beneficiary of this plan?

Yes

No

If 'No', what is the proportion or share of your rights under the plan?

 %

Qualifying Policies

Do you have any other qualifying policies which:

- were taken out from 6 April 2013, **or**
- were taken out before 6 April 2013 where the term of the plan or the payment has changed from then, unless the sole purpose of the plan is for repaying an interest only mortgage

Yes

No

Declaration and Signature

I declare that the payment limit of £3,600 per annum for qualifying policies has not been broken as a result of taking out this plan.

I declare that the information provided above is correct and complete to the best of my knowledge and belief.

Signature



Date

(DD/MM/YYYY)



Signature required

Your Personal Details

Plan number

Date of risk (DD/MM/YYYY)

Full name

Full postal address

House number Street

Town/city

County Postcode

Date of birth (DD/MM/YYYY) National Insurance Number

Phone number (including STD code)

email address

% Proportion/Share held

Are you the sole beneficiary on this plan? Yes No If 'No', what is the proportion or share of your rights under the plan? %

Qualifying Policies

Do you have any other qualifying policies which:

- were taken out from 6 April 2013, or
- were taken out before 6 April 2013 where the term of the plan or the payment has changed from then, unless the sole purpose of the plan is for repaying an interest only mortgage

Yes No

Declaration and Signature

I declare that the payment limit of £3,600 per annum for qualifying policies has not been broken as a result of taking out this plan.

I declare that the information provided above is correct and complete to the best of my knowledge and belief.

Signature

Date (DD/MM/YYYY)

Please complete all sections on this page if there is more than one plan owner or beneficiary.



If there's more than 2 new plan owners or beneficiaries, please photocopy this page and complete their details on the new page.

Where there's more than one plan owner or beneficiary, please tell us the proportionate share of your rights under the plan. For example, a joint life plan is normally 50% for each owner. This includes plans held in your name or held in a trust. Please read the **Important information** at the end of this form for more information about what the payment limit is.



Signature required

What to do next

Once you've completed the form, and signed and dated the relevant declaration section, please return it to us at this address:
 Standard Life, Life Services, Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH

Important information

As there are tax advantages for qualifying policies, HMRC need you to sign this declaration. By signing, you are confirming whether the yearly payments to this plan, plus any others held in your name or held in trust do not exceed £3,600 per annum in total.

Payments made from 6th April 2013 for the following qualifying policies can count towards the new £3,600 per annum limit:

- Plans taken out from 21st March 2012
- Plans taken out before 21st March 2012 where the term of the plan or the payment is changed from then, unless the sole purpose of the plan is for repaying an interest only mortgage
- Some assignments including assigned to a spouse or civil partner or put in or out of trust from 6th April 2013

It is important to note that the payment limit of £3,600 per annum applies to what HMRC refers to as each 'beneficial owner' (these are listed in the 'Who needs to complete this form' section on the first page). If there is more than one plan beneficial owner, the payments for the plan will count in full towards each owner's payment limit.

Please note that if you would be in breach of the payment limit by taking out this new plan you may not be able to proceed with it, please call us on 0345 272 6630 to discuss your options.

If a qualifying policy has no surrender value, and is not capable of acquiring a surrender value, the payments will not count towards the £3,600 limit.

Data Protection

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.com/sl/privacy-policy/slal.page>.

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