

# TYE 2022 Important information for Individual and Workplace

## Cut-off dates

There are important cut off dates you need to be aware of in the lead up to tax year end. Please ensure all relevant business is completed by the dates specified.

### Individual and Workplace

BACS (last day for sending)	Monday 28 March
CHAPS (last day for sending)	Monday 4 April
Cheque (must be received in Standard Life House, Lothian Road)	Tuesday 5 April
Active Direct Debit Instruction (including DDW schemes)	Tuesday 29 March
New Direct Debit Instruction (including DDW schemes)	Tuesday 22 March
Debit Card payment received online	23.59 on Tuesday 5 April
Debit Card payments received by telephone	Tuesday 5 April

### Drawdown

<b>Payments In (singles, transfers with a drawdown request)</b>	
Internal Transfers (Standard Life Insured Pension (SLIP) funds)	Monday 4 April
External Transfers (Standard Life Insured Pension (SLIP) funds)	Monday 4 April
External Transfers (Self Investment (SI) Cash)	Tuesday 5 April
<b>Payments Out (paid by BACS)</b>	
Income payment out	Friday 1 April
Tax Free lump sum payments (SLIP)	Monday 4 April
Tax Free lump sum payments (SI cash)	Tuesday 5 April

All of the above are subject to there being sufficient liquidity and us receiving a clean instruction.

### Additional dates

International Bond Surrenders (incl. partial surrenders) – For surrenders to be paid in advance of tax year end (not guaranteed where monies are invested with third parties)	Tuesday 15 March
For Assignment on International Bonds where payment out is expected in the current tax year. This allows sufficient time for processing both the assignment and payment out transaction.	Tuesday 8 March
For all LIFE products we must receive a valid request on or before NOTE – If a Life policy requires Assignment before Surrender, we must receive a valid Assignment and Surrender instruction before Friday 11 March.	Monday 28 March

## Bank account, payment and address information

### Standard Life Assurance Ltd

30 Lothian Road  
Edinburgh  
EH1 2DH

### SIPP Bank Account:

(Made payable to Standard Life Assurance with plan number as reference or written on the back of the cheque)

**Sort Code:** 40 03 28

**Acc No:** 42288230

### Life and Pensions Bank Account:

(Made payable to Standard Life Assurance with plan number as reference or written on the back of the cheque)

**Sort Code:** 40 03 28

**Acc No:** 22288192



Standard Life Assurance Limited is registered in Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH.

Standard Life Assurance Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. [www.standardlife.co.uk](http://www.standardlife.co.uk)

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