

Group Flexible Retirement Plan and Group Self Invested Personal Pension

Confirmation of adviser charges

GFRP15 0321

Who this form is for

Where Standard Life Assurance Limited have confirmed that the scheme can operate adviser charging (see Important information for advisers section below), this form should be used by you, the planholder, and your financial adviser to confirm the level of adviser charge(s) to be paid from your Group Flexible Retirement Plan (GFRP) or Group Self Invested Personal Pension (GSIPP).

This form must be completed for any new adviser charging request or where an amendment to an existing adviser charging agreement results in an increase to the level of adviser charges being paid. This form can be used by planholders who are currently active members of or have left their employer's GFRP/GSIPP scheme.

Important information for advisers to read before completing this form

Our Workplace Adviser Charging Proposition – Before you submit this form, we strongly recommend you refer to our 'Workplace Adviser Charging Proposition Summary' document (GEN3012) for details on our adviser charging availability on pre-RDR and post RDR GFRP/GSIPP schemes and our four main processes – 1) our due diligence process may apply for ongoing adviser charging to two or more members; 2) scheme conversion process for pre-RDR schemes to make adviser charging available switches off all commission; 3) how to request a quote/illustration; 4) how to apply for adviser charging via our 'Confirmation of adviser charges' form (GFRP15).

3rd party advisers – If you are not the scheme adviser, we may be unable to facilitate adviser charging if the member's plans are part of a scheme paying commission to the scheme adviser. The scheme adviser would need to agree to commission being switched off and an adviser charging structure set up instead. Please speak to your usual Standard Life contact to discuss options.

Quote process – Prior to submitting this form, quotes can be requested by emailing sales_quotes@standardlife.com or phoning 0345 279 8899. Call charges will vary (online quotes are not available).

Apply process – This form should be sent via post to Standard Life, Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH.

Filling in 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 a mistake, please initial any changes you make.

Part 1 – Planholder's personal details

Surname	<input type="text"/>
First name(s) in full	<input type="text"/>
Scheme number	<input type="text"/>
Plan number	<input type="text"/>

Services provided (to be completed by adviser)

Part 2 – 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 completing the signature box of this form, you are:

- Agreeing to the payment of the adviser charges documented, and
- Authorising Standard Life to accept all future instructions from your adviser, relating to this application, for payment of adviser charges that you have agreed to pay to them from your plan.

Please check that your quote matches the adviser charging basis you’ve chosen.

Part 2a – Initial Adviser Charge for single and transfer payments

Complete this section if you have agreed to pay your adviser for initial advice in relation to a single payment(s) from you (and/or your employer) or a transfer payment(s).

Initial Adviser Charges will be deducted as each transfer payment is processed.

Single payment from you	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Single payment from your employer	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 1	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 2	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 3	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%

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



Important Information

Setting up adviser charging is not a condition of joining or making payments into your pension plan. You are not required to complete this adviser charging form, even if your pension plan is part of a scheme provided by your employer and the adviser referred to in this form is the scheme adviser. Please only sign this form if you are sure you wish to set up adviser charging from your plan. You can instruct us to change or stop paying adviser charges at any time.

- By signing this form you are confirming that:
- You have been provided with a quote or illustration which shows the effect the adviser charges will have on your plan and the charges shown are consistent with the information contained in this form.
 - You are aware that, if your pension plan is provided by your employer, any ongoing adviser charges will continue to be paid if you stop working for your current employer.
 - If the adviser named in this form is the current scheme adviser for your employer’s pension scheme, any ongoing adviser charges will continue to be paid if the adviser ceases to act as the scheme adviser.
 - We will pay this charge until you instruct us to stop - if your plan is a GFRP, this means we will continue to pay this charge even if you stop working for your current employer.
 - You agree to your financial adviser receiving the adviser charge(s) described in Part 2 and authorise Standard Life to accept all future instructions from your adviser to pay charges that you have agreed with your adviser.
 - You agree to be bound by the ‘Terms and Conditions for paying your adviser’ (PENAC62).

If you are invested in the ‘default arrangement’ of a Qualifying Workplace Pension Scheme we are required to cap charges at a maximum of 0.75% a year of the value of your fund. The cost of paying an adviser from your plan is in addition to the annual fund charge and so the adviser charging referred to in this form may mean that the charge cap could be exceeded, which is allowed within the charges cap legislation.

If there is anything in this form you do not understand, please speak to your financial adviser or contact us.

Planholder		 Signature required
Signature ▶	<input type="text"/>	
Date (DD/MM/YYYY)	<input type="text"/>	
Financial adviser		 Signature required
Signature ▶	<input type="text"/>	
Date (DD/MM/YYYY)	<input type="text"/>	

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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