

### Who this form is for

When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

This application form is for people who want to transfer the value of rights built up in another pension scheme or policy into a Standard Life Group Self Invested Personal Pension. The minimum transfer payment we can accept is £10,000. There is no minimum payment for transfers from other Standard Life contracts. This form must be accompanied by form GFRP34 (Rapid Transfer for a Group Flexible Retirement Plan or a Group Self Invested Personal Pension Application) which your adviser and ceding Scheme Administrator will complete. GFRP34 and the attaching spreadsheet will form part of your application.

This form is not suitable for in-specie transfers. Please use form GSIP31.

**GSIP33 0221**

### Filling in this form

**Before completing this form please read the appropriate Key Features Document.**

**The answers you give on this form will be used to assess whether your transfer payment can be accepted into a Standard Life Group Self Invested Personal Pension. If you do not answer the questions correctly, your plan could be declared void. Please inform Standard Life of any changes to your answers which happen before your plan starts.**

A copy of the standard terms and conditions of the Plan and the completed application form will be sent to you on request.

For some types of transfers you must take financial advice. 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 completing this form. There is likely to be a cost for financial advice.

**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.**

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.

An In-specie transfer is a transfer of the ownership of the asset rather than its cash value.

### Part 1 – Your personal details

1. Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>	2. Sex	Male <input type="checkbox"/>	Female <input type="checkbox"/>
3. Surname	<input type="text"/>			
4. First name(s) in full	<input type="text"/>			
5. Date of birth (DD/MM/YYYY)	<input type="text"/>	6. National Insurance Number	<input type="text"/>	
7. Address				
House number	<input type="text"/>			
Street	<input type="text"/>			
City/Town	<input type="text"/>			
County	<input type="text"/>			
Postcode	<input type="text"/>			



**Part 4b – How do you want the money that will be paid into the SIPP Bank Account to then be invested?**

**SIPPZone mutual funds**

Citicode	Mutual funds from SIPPZone	Investment priority order (1-10)	Amount to be invested	Income funds (see margin note)
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
			£	<input type="checkbox"/>
<b>Sub Total A</b>			<b>£</b>	

**Mutual funds from Fidelity FundsNetwork**

Mutual funds from Fidelity FundsNetwork (fund names)	Investment priority order (1-10)	Amount to be invested	Income funds (see margin note)
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
		£	<input type="checkbox"/>
<b>Sub Total B</b>		<b>£</b>	



**IMPORTANT NOTES WHEN COMPLETING THIS PAGE**

Please note that the fund code(s)/citicode(s) and the FULL fund name(s) must be included in order for us to process your application. If we do not have this information we may have to return your application.

For income funds cross the box in the last column of this table if you wish the income to be paid into the SIPP Bank Account.

To tell us which order we should make your Additional Investments in, complete the investment priority column (1 being the investment you wish to make first).

The sum of Sub Totals A, B and C must not be greater than the part of the transfer payment going into the SIPP Bank Account, less the amounts needed to pay any charges, commission or fees.

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.





## Part 7 – Data Protection Notice and Communication Preferences – Important, please read

### 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.com/sl/privacy-policy/slal.page](http://www.standardlife.com/sl/privacy-policy/slal.page).

## Part 8a – Declarations

### Declaration by the administrator

In the event of Standard Life Assurance Limited accepting this application it hereby agrees as administrator and provider in terms of the rules of the scheme to administer the scheme as required by the rules.

### Declaration by applicant

1. 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.
2. I, the person named in Part 1, declare that in respect of my transfer payment I wish to become a member of the Standard Life Self Invested Personal Pension Scheme.
3. In consideration of the transfer being made, I undertake to be bound in all respects by the rules of the Schemes in force from time to time.
4. I declare that I am resident in the UK for tax purposes or that I am (or my husband, wife or civil partner is) a Crown servant working overseas.
5. I understand that, where I am receiving advice from a financial adviser, the adviser is acting on my behalf.
6. I authorise Standard Life to disclose to my employer (or the person within my business who is the contact name for enquiries), any information regarding the payments made to my plan, how these payments are invested and the value of my plan if requested.

*If you do not wish your employer to have access to this information, then please write to us at: Standard Life Assurance Limited, Group Pensions, Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH.*

7. I have read and understood the Data Protection Notice. I agree that my personal information (including special category data) may be used for the purposes described (subject to me exercising my right not to be contacted with details of other products and services).
8. I request my former scheme to make a transfer payment to Standard Life in accordance with this form and provide such information as Standard Life requires to administer that payment.

Where the Transfer Value relates to Safeguarded Benefits under the Transferring Scheme, I am aware that I will lose those Safeguarded Benefits by continuing with the transfer. I agree that by carrying out this transfer I have no claim against the Trustees of the Transferring Scheme or Receiving Scheme for the loss of those Safeguarded Benefits.

9. I understand that I can access the Key Investor Information Documents (KIIDs) for my chosen funds (where available) from the [standardlife.co.uk](http://standardlife.co.uk) website or by calling Standard Life.

Signature

Date  
(DD/MM/YYYY)

**Part 8b – Execution Only Declaration – where no advice was given**

If you are not receiving advice from a financial adviser you must also complete this part.  
Please tick each of the following boxes to confirm that you agree with the corresponding statement.  
If you did not receive advice we cannot process this application form unless you confirm that you agree with all of the following statements.

- I am aware that Standard Life recommends that all customers should seek financial advice before joining or transferring to a SIPP.
- I have chosen not to seek financial advice and confirm that Standard Life have not provided me with any financial advice regarding this product.
- By not seeking advice, I am taking full responsibility for the suitability of this product for my needs, and will not hold Standard Life responsible for the suitability, or for any losses I may suffer as a result of my decision.

I confirm that the information I have given is true and correct to the best of my knowledge and belief.

Signature

Date  
(DD/MM/YYYY)

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If you are transferring a Defined Benefits pension scheme, or have safeguarded benefits and the amount you are transferring is £30,000 or more, you must take financial advice.

## Part 9 – Notes for completing Part 4

The descriptions and definitions given in this note are to help you complete this form and are not binding in law.

### A. 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 the 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 adviser.

When making Additional Investments under the Standard Life 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.

#### Important notes:

- Please ensure you set aside enough money in the SIPP Bank Account for any Additional Investments.
- For transfer payments, we will process these as per the instructions you have given in the application form. Where we cannot achieve this we will contact your 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.
- If you want to buy an Open Ended Investment Company fund that is not available in the mutual funds available from Standard Life, please contact us.

#### Other providers' 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.

Standard Life Assurance Limited and Standard Life Trustee Company Limited are owned by the Phoenix Group and use the Standard Life brand under licence from the Standard Life Aberdeen Group. You can find more information about Standard Life Aberdeen plc's strategic partnership with Phoenix at [www.standardlife.com/partnership](http://www.standardlife.com/partnership)  
Standard Life Assurance Limited is the provider and scheme administrator of the Standard Life Self Invested Personal Pension Scheme, and Standard Life Trustee Company Limited is the trustee.

Standard Life Assurance Limited is registered in Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH. Standard Life Trustee Company Limited is registered in Scotland (SC076046) 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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