

Who this form is for

When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.
 You should use this form if you are making regular payments and you wish to invest all or part of each payment in assets that aren't Standard Life Investment Policy (SLIP) funds. We'll pay all of the regular payment into the SIPP bank account before investing it (except for any part of the payment that you wish to invest in the SLIP funds).

GSIP36 0918



IMPORTANT
 Please refer to 'Information about tax relief, limits and your pension' (GEN658) for information about your annual allowance.

Filling in this form

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

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.

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.

Important

Please ensure you read the booklet 'How regular investments under a GSIPP work' (NEP13).
 For further details of charges, please see 'Charges Sheet' (GSIP20).

Part 1 – Your personal details

National Insurance Number	<input type="text"/>	Date of birth (DDMMYYYY)	<input type="text"/>
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	<input type="text"/>		
Surname	<input type="text"/>		
First name(s) in full	<input type="text"/>		
Plan Number (if known)	D <input type="text"/>	Plan Number (if known)	J <input type="text"/>

Part 2 – What self investment assets do you wish to purchase from the SIPP bank account in respect of your regular payments?

Important

Please refer to www.standardlife.co.uk for information on the investments available to you.
Please note that the citicode(s)/fund code(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.

Part 2a – SIPPZone mutual funds

For income funds do you wish the income to be paid into the SIPP Bank Account? Yes No

citicode	SIPPZone mutual fund (fund names)	Monthly Amount to be invested
		£
		£
		£
		£
		£
		£
		£
		£
		£
		£
	Sub Total A	£

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.

The sum of Sub Totals A, B and C must not be greater than the regular payment going into the SIPP bank account, less the amounts needed to pay any charges (including adviser charges), commission.

Important

Please note that 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.

Part 2b – Mutual funds from Fidelity FundsNetwork

For income funds do you wish the income to be paid into the SIPP Bank Account? Yes No

Mutual funds from Fidelity FundsNetwork (fund names)	Monthly Amount to be invested
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
Sub Total B	£

The sum of Sub Totals A, B and C must not be greater than the regular payment going into the SIPP bank account, less the amounts needed to pay any charges (including adviser charges), commission.

Part 2c – Other Investments

Other Investments (provider, fund name and type of shares)	Monthly amount to be invested
	£
	£
	£
	£
	£
	£
	£
	£
	£
Sub Total C	£

Your Financial Adviser must obtain an application form from the other provider for Standard Life to sign. There may be a requirement to check acceptability of assets before investment can be made. The sum of Sub Totals A, B and C must not be greater than the regular payment going into the SIPP bank account, less the amounts needed to pay any charges (including adviser charges, commission).

Financial adviser details – to be completed by the scheme adviser

Intermediary Reference No. (maximum 25 characters)

Contact name

Agency name

Agency code

Email @

Telephone number

Mobile number

Basis of Sale Whole of Market Other

If other please specify:

Was advice given? Advice No advice (eg, Execution-only)

Status of Client (eg execution-only)

Financial Conduct Authority or Authorisation No.

Please complete the sections below as appropriate

Section A – Commission basis (schemes established prior to 31 December 2012)

If you gave a personal recommendation, was this in line with an agreement you made with the employer before 31 December 2012? Yes No

Type of commission	Regular payments	Single payments
Initial Commission		£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Fund Based Commission (FBC)	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %

Section B – Adviser charging basis

Adviser charges may be available where the scheme was set up on or after 15 October 2012 (unless the scheme was set up after this date on a commission paying basis) or if the scheme was set up before this date and we have agreed to make adviser charges available.

If you are providing individual advice to a scheme member paid for by an adviser charge please complete the Confirmation of adviser charges form (GFRP15).

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
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

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