

Illustration request - International Bond investing in the Elevate GIA

IB102 1220

Please complete the following template and return to tech_quotes@standardlife.com

Adviser agency code or business postcode	<input type="text"/>	
Adviser email address	<input type="text"/>	
Client Name(s)	1 <input type="text"/>	
	2 <input type="text"/>	
Client Date(s) of Birth	1 <input type="text"/>	
	2 <input type="text"/>	
Capital Redemption Bond	<input type="checkbox"/>	or Life Assurance Bond <input type="checkbox"/>
Investment Amount	£ <input type="text"/>	
Withdrawals	£ <input type="text"/>	<input type="text"/> %
Investment choice	Elevate platform	
Elevate platform charge	<input type="text"/> %	Fund AMC(s) <input type="text"/> %
Initial adviser charge	£ <input type="text"/>	<input type="text"/> % Inside <input type="checkbox"/> Outside <input type="checkbox"/>
Ongoing adviser charge	£ <input type="text"/>	<input type="text"/> %
If investing in a Discounted Gift Plan:	1 <input type="text"/>	
Settlor Name(s)	2 <input type="text"/>	
Settlor Date(s) of Birth	1 <input type="text"/>	
	2 <input type="text"/>	

If your client is invested in more than one fund then please calculate the average AMC. To ensure this is as close to the charge as possible, the average should be weighted by the amount in each fund.

Please refer to the Elevate ISA and General Investment Account Illustrations Tool if you require any assistance in calculating the charge. This can be found online on the Elevate Website.

(Please note that where the International Bond is set up on a life assurance basis, the settlor cannot be a life assured).

Data Protection

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