Who this form is for
This form is for investment in the Standard Life International Bond by:
trustees of an existing trust (please submit a certified copy of the trust deed with this application)
or
trustees of a Discounted Gift Plan, Gift Plan or Loan Plan who are investing a lump sum.
The International Bond can be written on either a Capital Redemption or Life Assurance basis.
If making an additional investment to an existing bond, please use the application form for additional payments (IB31).

Filling in this form
You should remember that your financial adviser is acting on your behalf, not only by giving you advice, but also regarding completing 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 an error, please initial any changes.
All relevant sections of the application form must be complete and applicable documents attached for the bond to proceed. Use the checklist provided on page 2.
We will use the information provided on this application form before taking information from any attached illustration. A copy of the completed application form will be sent to you on request.
Before completing this form, please ensure you have read the Key Features Document and the Key Information Document (KID), and where relevant, the appropriate Supplementary Information Document (SID) or Key Investor Information Document (KIID).
The Policy Provisions and Policy Schedule together form the terms and conditions of your product and each policy is evidence of a contract between you and Standard Life International.
The start date of your bond will be the latter of;
• the date we receive the initial payment; and
• the date we receive all the relevant, signed documentation needed to start the bond.
For adviser use only – Please see Adviserzone for our Guidance on FATCA legislation including our ‘Guide to FATCA and the new Common Reporting Standard’ (GEN2108).

Please send the completed application form, supporting documents and any cheque payments to us at this address:
Standard Life International Scanning Unit
Standard Life House
30 Lothian Road
Edinburgh
EH1 2DH
(Only email documents if requested.)
### Avoiding delays – checklist

The sections listed below may not need completed for all applications. However, any missing information relevant to your application will cause a delay.

<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trust Deed</strong></td>
<td>Enclosed, at minimum, a 'wet signature' certified copy of Trust Deed (this will be returned to you)  &lt;br&gt; The trustees named on the deed match the application form  &lt;br&gt; For existing trusts, provide any relevant deeds of appointment or retirement along with preceding trust deed</td>
</tr>
<tr>
<td><strong>Part 1 – Financial adviser details</strong></td>
<td>Standard Life agency code  &lt;br&gt; Enclosed illustration (new business quote)</td>
</tr>
<tr>
<td><strong>Part 7 – Tax residency self declaration</strong></td>
<td>Most Trusts will fall into one of the categories listed</td>
</tr>
<tr>
<td><strong>Part 12 – Anti Money Laundering Regulations</strong></td>
<td>One piece of both certified photo ID and address evidence per settlor and/or trustee</td>
</tr>
<tr>
<td><strong>Part 14 – Payment: amount, method and source</strong></td>
<td>Source bank account details</td>
</tr>
<tr>
<td><strong>Part 15 – The breakdown of your payment</strong></td>
<td>Complete this part in full</td>
</tr>
<tr>
<td><strong>Part 20 – International Bond Bank Account</strong></td>
<td>Assign money to the IB Bank Account</td>
</tr>
<tr>
<td><strong>Part 21 – Investment Funds</strong></td>
<td>Citicodes and/or insured fund codes (<a href="http://www.adviserzone.com">www.adviserzone.com</a>)  &lt;br&gt; Investment total 100% including IB bank account</td>
</tr>
<tr>
<td><strong>Part 25 – Regular Disinvestment</strong></td>
<td>Confirm the disinvestment frequency</td>
</tr>
<tr>
<td><strong>Part 34e and/or 34f – Trustees signatures</strong></td>
<td>Application Form has been signed and dated on or after creation of the trust  &lt;br&gt; All trustees have completed the relevant personal details and signed the forms</td>
</tr>
</tbody>
</table>
## Part 1 – Financial adviser details (to be completed by your financial adviser)

Failure to complete the following will delay the processing of this application.

<table>
<thead>
<tr>
<th>Agency code (MUST be completed)</th>
<th>FCA/PRA or other authorisation number</th>
</tr>
</thead>
</table>

| Agency name                     |                                      |
|---------------------------------|                                      |
| Name of regulator               |                                      |
| Business writer name(s)         |                                      |

**Contact – Who should we contact with any questions about this application?**

| Contact’s name                  |                                      |
|---------------------------------|                                      |
| Telephone – Office              |                                      |
| Email address                   | @                                    |

### Sales Advice and Anti Money Laundering

1. **Basis of sale**
   - Whole of market [ ]
   - Other [ ]
   - If ‘Other’, please specify

2. I can confirm advice has been given in relation to this bond. [ ]
   - Yes [ ]
   - No* [ ]

3. I confirm that any adviser charges paid from this bond will only be for advice or services paid in relation to this bond. [ ]
   - Yes [ ]
   - No [ ]

4. I have supplied my clients with all relevant documentation, including the Key Information Document and relevant investor information documents, and instructed my clients to read all documents carefully before proceeding, and ask for further information if they do not understand any of the content. [ ]

*Where no advice has been given, you confirm you have ensured (and will continue to ensure) the Bond and the underlying investments are appropriate for your client.

By completing this part, you are confirming that you are taking responsibility for submitting this piece of business for your client.

### Anti Money Laundering declaration

Under Anti Money Laundering regulations, Standard Life International is obliged to apply customer due diligence measures to its policyholders, including the verification of policyholder’s identity and address.

- I/We confirm that all details (including identity, address, source of wealth and source of funds) of the customer have been verified.
- I/We have enclosed certified copies of all documentation used to verify the identity and address of the bond owners.

**Signed**

**Date (DD/MM/YYYY)**

It’s important you enter the correct agency code to ensure you are remunerated as intended.

We do not accept home visit or online credit checks as evidence.

Adviser’s signature required
Part 2 – Choice of International Bond (to be completed by you)

- Capital Redemption Bond
- Life Assurance Bond

Part 3 – Authorising your financial adviser to give investment instructions on your behalf (to be completed by you)

I authorise Standard Life International to accept instructions from the financial adviser named in this form to buy or sell investments under my bond. This will apply until Standard Life receives a written instruction from me changing or withdrawing my authorisation.

If you do not want to authorise your financial adviser, as outlined above, cross this box: 

Part 4 – Choice of law (to be completed by you)

Please note that if you are habitually resident in the Channel Islands or Isle of Man, then this section will not apply to you, and the law of England and Wales shall apply to the bond.

- England and Wales
- Scotland
- Northern Ireland

Part 5 – Type of Trust (to be completed by you)

Please tick the box to indicate the type of bond owner

- Existing trust
- Pension scheme
- Loan Plan
- Discounted Gift Plan
- Gift Plan

Part 6 – Details of the trust (to be completed by you)

If you are applying for a bond in your capacity as trustees, we require each trustee to fully complete parts 7 and 8 for individual trustees or parts 9, 10 and 11 for corporate trustees. The information you provide will enable us to carry out appropriate identification checks to satisfy money laundering regulations.

Name of trust or pension scheme (if any)

Date of trust (DD/MM/YYYY)

Where is the trust tax resident? Please provide the relevant Taxpayer Identification Number (TIN):

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

Tax residency information

Only required if tax resident outside of Ireland.

You can enter up to five countries. If the trust is tax resident in more than five countries, please photocopy this page.

For adviser use only –

Please see Adviserzone for our Guidance on FATCA legislation including our ‘Guide to FATCA and the new Common Reporting Standard’ (GEN2108).
Part 6 – Details of the trust (to be completed by you) – continued

Settlor details where settlor is not a trustee. (Only complete if applicable and only where the settlor is a company)

Name

Address

Company/LLP Registration number

Name

Address

Company/LLP Registration number

Part 7 – Tax residency self declaration

1. Are you:

- A financial institution* □
- An actively trading non-financial services business including non-Irish charities/not-for-profit organisations □
- A pension fund □
- An investment body □

Please see below definitions:

An actively trading non-financial services business

“Actively trading non-financial services business”. This includes all actively trading companies or trusts which are not financial institutions, that do not exist simply to hold investments or receive income.

An investment body

“Investment Body” will include private trusts or companies, which only exist to hold investments or receive income.

A financial institution

“Financial Institution” include entities like bank or life insurance companies and professionally managed trusts. Most trusts will either be ‘A financial institution’ if a corporate trustee is involved, or ‘An investment body’.

* Please provide us with your relevant Global Intermediary Identification Number (GIIN) if you are a financial institution.

GIIN

We need this information to allow us to comply with current tax laws.

For adviser use only –
Please see Adviserzone for our Guidance on FATCA legislation including our ‘Guide to FATCA and the new Common Reporting Standard’ (GEN2108).
## Part 8 – Personal details

Please complete all sections where applicable. In each instance, please indicate whether or not the information enclosed is for the settlor and/or trustee and/or trust protector and/or trust beneficiary and/or life assured* (pages 6-10).

- For any life assured who is not also a settlor and/or trustee and or trust protector and/or trust beneficiary, please complete details on page 10. *Please note that life assured details are not relevant to the Capital Redemption option.
- All trustees will own the bond and all current trustees must provide their full details. If the settlor is a trustee, please remember to complete their details too. Please note that all correspondence will be issued to the first named trustee.
- If settlor(s) is/are deceased, please provide certified copy of either death certificate or grant of probate. You do not need to complete the settlors details in part 8 if this applies.

### Tax residency information only required if tax resident outside of Ireland.

<table>
<thead>
<tr>
<th>Trust Protector</th>
<th>Trust Beneficiary</th>
<th>Settlor</th>
<th>and/or Trustee</th>
<th>and/or life assured*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)</td>
<td>Date of birth (DD/MM/YYYY)</td>
<td></td>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>Surname</td>
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<tr>
<td>First name(s) (in full)</td>
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<td>Nationality</td>
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</tr>
<tr>
<td>Telephone – (inc. STD code)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Occupation</td>
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</tbody>
</table>

Occupation is required for settlors or persons placing money into the trust. You need to let us know if the money you’re investing is from your salary. Please make sure you include this in part 13 ‘Source of Wealth’ and that you provide your adviser with anti-money laundering verification requirements found in Part 12. If retired please complete as ‘retired’.

Please provide percentage share of the trust for each trust beneficiary if known e.g. for Absolute Trusts. Where the trust beneficiaries have still to be determined, please leave blank and provide the class of persons in whose main interest the trust is set up or operates e.g. for Discretionary Trusts.

If you are a beneficiary, what is your share of the trust?  
| | % |

Class of beneficiary

What is relationship to the Settlor?

Please make sure you complete all parts of this form. If there are more than four trustees please photocopy this page.

Please cross all boxes that apply to you.

For a Discounted Gift Plan, the settlor or settlor’s spouse cannot be a life assured.

You can enter up to five countries. If you are tax resident in more than five countries, please photocopy this page.

For adviser use only – Please see Adviserzone for our Guidance on FATCA legislation including our ‘Guide to FATCA and the new Common Reporting Standard’ (GEN2108).
### Part 8 – Personal details (Continued)

**Settlor/Trustee/Beneficiary/Trust Protector 1 (continued)**

Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
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</table>

**Settlor/Trustee/Beneficiary/Trust Protector 2**

<table>
<thead>
<tr>
<th>Trust Protector</th>
<th>Trust Beneficiary</th>
<th>Settlor and/or Trustee and/or life assured*</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Title**  
(Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

<table>
<thead>
<tr>
<th>Date of birth (DD/MM/YYYY)</th>
<th>Male</th>
<th>Female</th>
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</tbody>
</table>

**Surname**

**First name(s) (in full)**

**Nationality**

**House number**

**Street**

**City/Town**

**Postcode**

**Email address**

@

**Telephone – (inc. STD code)**

**Occupation**

Occupation is required for settlors or persons placing money into the trust. You need to let us know if the money you’re investing is from your salary. Please make sure you include this in part 13 ‘Source of Wealth’ and that you provide your adviser with anti-money laundering verification requirements found in Part 12. If retired please complete as ‘retired’.  

If you are a beneficiary, what is your share of the trust?

<table>
<thead>
<tr>
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<tbody>
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</table>

What is relationship to the Settlor?

Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
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</tbody>
</table>

You can enter up to five countries. If you are tax resident in more than five countries, please photocopy this page.

A settlor and/or trustee can also be a life assured – if this applies to you, cross both boxes.

For a Discounted Gift Plan, the settlor or settlor’s spouse cannot be a life assured.
### Part 8 – Personal details (Continued)

#### Settlor/Trustee/Beneficiary/Trust Protector 3

<table>
<thead>
<tr>
<th>Trust Protector</th>
<th>Trust Beneficiary</th>
<th>Settlor and/or Trustee</th>
<th>and/or life assured*</th>
</tr>
</thead>
</table>

**Title**  
(Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)

**Surname**

**First name(s)**  
(in full)

**Nationality**

**House number**

**Street**

**City/Town**  
Postcode

**Email address**

**Telephone**  
(incl. STD code)

**Occupation**

Occupation is required for settlors or persons placing money into the trust. You need to let us know if the money you’re investing is from your salary. Please make sure you include this in part 13 ‘Source of Wealth’ and that you provide your adviser with anti-money laundering verification requirements found in Part 12. If retired please complete as ‘retired’.

If you are a beneficiary, what is your share of the trust?  
\[
\begin{array}{c|c}
% & \% \\
\end{array}
\]

What is relationship to the Settlor?

Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
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<tbody>
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</tbody>
</table>
### Part 8 – Personal details (Continued)

#### Settlor/Trustee/Beneficiary/Trust Protector 4

<table>
<thead>
<tr>
<th>Trust Protector</th>
<th>Trust Beneficiary</th>
<th>Settlor</th>
<th>and/or Trustee</th>
<th>and/or life assured*</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

**Title**

(Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)

<table>
<thead>
<tr>
<th>Surname</th>
<th>First name(s) (in full)</th>
<th>Nationality</th>
<th>House number</th>
<th>Street</th>
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</tr>
</tbody>
</table>

**Date of birth**

(DD/MM/YYYY)

<table>
<thead>
<tr>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
</tbody>
</table>

**Email address**

@

**Telephone – (inc. STD code)**

If you are a beneficiary, what is your share of the trust?

<table>
<thead>
<tr>
<th>%</th>
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What is relationship to the Settlor?

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</table>

**Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:**

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
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</tbody>
</table>

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**A trustee can also be a life assured – if this applies to you, cross both boxes.**

For a Discounted Gift Plan, the settlor or settlor’s spouse cannot be a life assured.

You can enter up to five countries. If you are tax resident in more than five countries, please photocopy this page.
### Part 8 – Personal details (Continued)

#### Life assured 1 – For individuals who are life/lives assured only

<table>
<thead>
<tr>
<th>Title</th>
<th>Date of birth (DD/MM/YYYY)</th>
<th>Male</th>
<th>Female</th>
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<td>Surname</td>
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<td>First name(s) (in full)</td>
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<td>Street</td>
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</table>

| City/Town            | Postcode                   |      |        |

#### Life assured 2 – For individuals who are life/lives assured only

<table>
<thead>
<tr>
<th>Title</th>
<th>Date of birth (DD/MM/YYYY)</th>
<th>Male</th>
<th>Female</th>
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<td>First name(s) (in full)</td>
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| City/Town            | Postcode                   |      |        |

#### Life assured 3 – For individuals who are life/lives assured only

<table>
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<tr>
<th>Title</th>
<th>Date of birth (DD/MM/YYYY)</th>
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<th>Female</th>
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<tr>
<td>First name(s) (in full)</td>
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<td>Street</td>
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</tbody>
</table>

| City/Town            | Postcode                   |      |        |

Please complete all parts in full.

Please note that Life Assured details are not relevant to the Capital Redemption option.
### Part 9 – Corporate Trustees

**Parts 9 to 11 are for Corporate Trustees Only. If no Corporate Trustees are involved in the bond go to part 12.**

<table>
<thead>
<tr>
<th>Company/ Limited Liability Partnership (LLP) name</th>
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</thead>
<tbody>
<tr>
<td>Company/LLP Registration number (if applicable)</td>
</tr>
<tr>
<td>FCA Register Number (if applicable)</td>
</tr>
</tbody>
</table>

**Company address**

| Number | 
| Street | 
| City/Town | 
| County | 
| Postcode | 
| Telephone | 

Please attach a certified copy of the list of authorised signatories and **mark a cross in the box to confirm this has been done.**

Where is the company tax resident? Please provide the relevant Taxpayer Identification Number (TIN).

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
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</table>

**Tax residency information**
Only required if tax resident outside of Ireland.

You can enter up to five countries. If you are tax resident in more than five countries, please photocopy this page.

**For adviser use only**
Please see Adviserzone for our Guidance on FATCA legislation including our ‘Guide to FATCA and the new Common Reporting Standard’ (GEN2108).
Part 10 – Corporate Trustees; Tax residency self declaration

1. Are you:
   - A financial institution* ☐
   - An actively trading non-financial services business including non-Irish charities/not-for-profit organisations ☐
   - A pension fund ☐
   - An investment body ☐

Please see below definitions:

**An actively trading non-financial services business**

“Actively trading non-financial services business”. This includes all actively trading companies which are not financial institutions, that do not exist simply to hold investments or receive income.

**An investment body**

“Investment Body” will include private companies or trusts, which only exist to hold investments or receive income.

**A financial institution**

“Financial Institution” include entities like bank or life insurance companies and professionally managed trusts. Most trusts will either be ‘A financial institution’ if a corporate trustee is involved, or ‘An investment body’.

* Please provide us with your relevant Global Intermediary Identification Number (GIIN) if you are a financial institution.

GIIN
### Part 11 – Beneficial owners of Corporate Trustee Company

Please provide names of all principle beneficial owners based on the below definition:

Under Irish anti-money laundering legislation, a “beneficial owner” is an individual who ultimately owns or controls more than 25% of the shares or voting rights of the company, or who otherwise exercises control over the management of the company. The exception to this is in relation to companies with securities listed on a regulated market.

**Tax residency information only required if tax resident outside of Ireland.**

### Corporate Trustee company – Beneficial owner 1

<table>
<thead>
<tr>
<th>Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)</th>
<th>Date of birth (DD/MM/YYYY)</th>
<th>Male □ Female □</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First name(s) (in full)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nationality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>House number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City/Town</td>
<td></td>
<td>Postcode</td>
</tr>
<tr>
<td>How much of the company do you own/ control?</td>
<td>□ %</td>
<td></td>
</tr>
<tr>
<td>Have you provided your adviser with both: Current photo ID □ Current address verification □</td>
<td>(Please refer to part 12 for acceptable evidence)</td>
<td></td>
</tr>
</tbody>
</table>

Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN). For example, in the UK it will be your National Insurance Number:

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
</tr>
</thead>
<tbody>
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<td></td>
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</tbody>
</table>
**Part 11 – Beneficial owners of Corporate Trustee Company (Continued)**

**Corporate Trustee company – Beneficial owner 2**

<table>
<thead>
<tr>
<th>Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)</th>
<th>Date of birth (DD/MM/YYYY)</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First name(s) (in full)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nationality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>House number</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Street</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City/Town</td>
<td></td>
<td>Postcode</td>
<td></td>
</tr>
<tr>
<td>How much of the company do you own/ control?</td>
<td></td>
<td>%</td>
<td></td>
</tr>
</tbody>
</table>

Have you provided your adviser with both:  
(Please refer to part 12 for acceptable evidence)  
Current photo ID | Current address verification

Where are you tax resident? Please provide the relevant Taxpayer Identification Number (TIN).  
For example, in the UK it will be your National Insurance Number:

<table>
<thead>
<tr>
<th>Country</th>
<th>TIN</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

If there are more than two ‘Beneficial owners of Corporate Trustee Company’ please photocopy this page.

You can enter up to five countries. If you are a tax resident in more than five countries, please photocopy this page.
Part 12 – Anti-Money Laundering Regulations for settlors, trustees, beneficial owners and trust protectors

In order to comply with anti-money laundering regulations, we must verify the identity and address of our customers. Please provide one photo ID document and one address verification document per settlor and trustee from the examples outlined below:

**Photo identification:**
- Valid signed passport
- Valid national identity card (non UK nationals)
- Valid UK/EU photocard driving licence
- Valid identity card issued by the Electoral Office for Northern Ireland

**Address verification:**
- Current utility bill
- Current bank statement
- Current tax statement
- Instrument of court statement (such as grant of probate)
- Full current driver's licence

Please note – current means dated within 6 months of bond application submission date.

Part 13 – Source of Wealth (for Settlor only)

We will not be able to proceed with your application unless the information requested here is fully completed.

**Annual income before taxation**
Please indicate which income band applies to you (if this is a joint application please state the combined income of the bond owners).

- Under £20,000
- £20,000 to £39,999
- £40,000 to £59,999
- £60,000 to £89,999
- £90,000 or more

Please tell us how you acquired the money you are investing, **cross all that apply**.
Provide additional details for all completed boxes in the free text box below.

- Compensation payment
- Sale of company/property
- Existing trust
- Inheritance
- Salary/bonus
- Savings
- Policy claim/maturity
- Sale of investments
- Other

Additional Details: (must be completed):

Failure to complete this section fully is the most common cause of delay in processing the application. To help: Provide evidence where possible – documents/internet links/etc. Use the free text box to provide as much information as possible.
### Part 14 – Payment: amount, method and source

The minimum initial single payment is £20,000 or £60,000 if you are setting up a Discounted Gift Plan. For investment in Whole of Market Funds or a discretionary investment manager, the minimum initial single payment is £100,000.

Some discretionary investment managers and deposit account providers may specify their own minimum investment.

**Offshore trusts:** Trusts whose trustees are residents of the Isle of Man or Channel Islands, may want to avoid funds passing through a UK bank account. If this applies to you please enquire about alternative bank details.

**Discounted Gift Plan only:**

For a **non-underwritten case** – send the payment with this application.

For a **fully underwritten case** – do not send the payment with this application.

We only require the payment after underwriting is completed and we receive confirmation to proceed. If a payment is received before, then the money will be held in a non-interest bearing account.

How much is the payment you are sending us? £

Cross one of the boxes below to indicate how the payment will be made:

- CHAPS/telegraphic transfer
- BACS
- Cheque

Cheques should be made payable to ‘Standard Life International’, enclose the cheque with this application form and send it to the address shown on page 1 of this form. For building society cheques, please ask the bank or building society to print your name on the cheque to confirm the source of funds.

Payments by cheque of £1 million or more will be subject to a six working day clearing period.

**Our bank details for payments are:**

<table>
<thead>
<tr>
<th>Bank name</th>
<th>HSBC Bank plc (London)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account name</td>
<td>Standard Life International Receipts</td>
</tr>
<tr>
<td>Account number</td>
<td>51296795</td>
</tr>
<tr>
<td>IBAN:</td>
<td>GB44MIDL40025051296795</td>
</tr>
<tr>
<td>Swift code</td>
<td>MIDLGB22</td>
</tr>
</tbody>
</table>

Your reference (This is the surname of the first bond owner)

Paying by BACS or CHAPS/telegraphic transfer – please provide bank details below.

NB: Withdrawals/Surrenders will be paid to this account unless otherwise specified.

Are the payments being invested owned by the Trustees? Yes [ ] No [ ]

Bank name

Account holder

Account number

Sort code

If the source account is held in the name of another person, please provide details:

- 
- 
- 
- 
- 
- 

Under Anti-Money Laundering regulations, Standard Life International is obliged to gather information on the origin of the payment being invested and on how the wealth leading to the investment was acquired.

Please note the amount you invest may be different from the amount you send us if you want us to facilitate an adviser charge before investing. See option ‘a’ in part 29 for further details.

Your bank may have a limit on faster payments.

Your bank may charge you for payments by CHAPS/TT.
### Part 15 – Breakdown of your payment

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total amount of the payment being sent to Standard Life International</td>
<td>£</td>
</tr>
<tr>
<td>Amount to be paid to your adviser as an initial adviser charge (see side note)</td>
<td>£</td>
</tr>
<tr>
<td>Payment amount to be invested in your International Bond (This figure should match the trust deed.)</td>
<td>£</td>
</tr>
</tbody>
</table>

### Part 16 – Segments

Please speak to your adviser if you're considering a different number of segments. You should be aware that:

- a minimum amount of £200 per segment is needed
- Payment amount must be divisible by the number of segments and be no more than two decimal places
- The withdrawal amount must match the retained payment figure shown in the Discounted Gift Plan trust deed
- Please consider how the number of segments, if split, will impact the beneficiaries of the trust

How many segments would you like?

- Maximum (up to 9999) [ ]
- 100 (default) [ ]
- Other (please specify) [ ]

### Part 17 – Recurrent single payment (Not available on Loan Plans or Discounted Gift Plans)

You can only make recurrent single payments by direct debit. The minimum limit depends on how often you make payments and whether you are also making a lump sum investment or have an existing bond.

- The minimum limits if you are only making recurrent single payments in a new bond are: £1,000 each month; £3,000 every 3 months; £6,000 every 6 months or £10,000 every year.
- The minimum limits if you have an existing bond, or are also making a lump sum investment of at least £20,000 are: £500 each month; £1,500 every 3 months; £3,000 every 6 months or £5,000 every year.

How much do you want to invest as a recurrent single payment? £

How often do you want to make recurrent single payments?

- Monthly [ ]
- 3 months [ ]
- 6 months [ ]
- Yearly [ ]

Please choose the first date for your recurrent single payments to be made from the 1-28 of the month (DD/MM/YYYY).

Subsequent payments will be made on the same date each month or year.

The first payment date must be a date after the date you have signed this form.
Part 18 – Recurrent single payment – Direct Debit Instruction  
(Not available on Loan Plans or Discounted Gift Plans)

Completion of your direct debit instruction
1. Complete this form to instruct your bank/building society to make payments directly from your account.
2. If the due date falls on a weekend or bank holiday, your account will be debited within two working days.
3. Please ensure that the instruction is signed and dated and the direct debit guarantee is detached before the instruction is returned to Standard Life International.

Instruction to your bank or building society to pay by direct debit
Issued by: Standard Life International, 90 St Stephen’s Green, Dublin 2

Name and full postal address of your bank or building society branch.

Name of account-holder(s)

Bank or Building Society Account No. Branch Sort Code

Reference number

Your instruction to the bank/building society, and signature
Please pay Standard Life International direct debits from the account detailed in this instruction subject to the safeguards assured by the direct debit guarantee. I understand that this instruction may remain with Standard Life International and, if so, details will be passed electronically to my bank/building society.

Signature  Date (DD/MM/YYYY)  Signature(s)  Date (DD/MM/YYYY)

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Standard Life International will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Standard Life International to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Standard Life International or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Standard Life International asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.
Part 19 – Your choice of investments

You can choose to invest in Standard Life insured funds, mutual funds, whole of market funds, the Elevate General Investment Account (Elevate GIA)* and deposit/structured deposit accounts. You can also choose to direct us to invest with a discretionary investment manager who will manage the investments.

*Elevate Portfolio Services Limited trades as Elevate and is part of Standard Life Aberdeen group. Elevate Portfolio Services Limited (01128611) is registered in England at 14th Floor, 30 St Mary Axe, London EC3A 8BF and authorised and regulated by the Financial Conduct Authority.

Note that:

If you choose to only invest in Standard Life insured funds, you don’t need to allocate part of your investment to the IB bank account. All charges and withdrawals will be applied by cancellation of units from those funds.

If part or all of your investment is to be invested in any type of investment other than insured funds, you must allocate part of your investment to the IB bank account.

Please note that we are not responsible for and nor do we guarantee the suitability or tax/regulatory/legal treatment of the bond, and it is your responsibility to ensure it remains suitable for your purposes. We are not authorised to give you tax or legal advice and so recommend you take your own independent advice.

All investment choices are made at your own risk, so it’s important to seek the appropriate financial advice.

Standard Life International is not responsible for the performance or solvency of the providers of the investments available through the International Bond.

Please note that some types of investment are not covered by the Financial Services Compensation Scheme (FSCS). Please refer to your Key Features Document/Key Information Document for more information.

Please give the percentages that you wish to invest in each investment option. Use whole numbers only and check that the total adds up to 100%. Remember to include any percentage invested in the IB bank account in the total percentage to cover charges and withdrawals.

If the amounts do not add up to 100% ALL the money will be invested in the IB bank account until you give us clear investment instructions for the whole amount.

<table>
<thead>
<tr>
<th>Recurrent single payments £ or %</th>
<th>Single payment £ or %</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

How much do you want to invest in the IB bank account?
Part 21 – Investment funds

If you’d like us to use the investment choices shown in the enclosed personal illustration please cross here.

Only complete this section if you wish to invest in insured or mutual funds.

You must include the Fund code or Citicode – we use this code to identify the fund. Failure to use the codes or allocate a percentage may mean we have to delay the investment into your Bond.

Adviser note:
For investment in ‘Whole of Market’ funds we will need the ISIN/Sedol number. When you have this, please contact your account manager or our Relationship Support Team on 0345 300 4273. (Call charges will vary.)

<table>
<thead>
<tr>
<th>Payment Type – Single or Recurrent</th>
<th>Fund code/Citicode</th>
<th>Fund name</th>
<th>£ or %</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-off payment</td>
<td>KKIG</td>
<td>SL Intl Standard Life MyFolio Managed III</td>
<td>EXAMPLE</td>
</tr>
</tbody>
</table>

Insured Funds

Mutual Funds

Part 21a – Elevate General Investment Account

Only complete this section if you wish to invest in the Elevate GIA. By completing this section you are authorising your adviser to buy and sell investments via the Elevate platform. Please note that your adviser must agree to the terms set out in Part 34a by adding their signature.

Elevate Account Number | £ or %
-----------------------|--------
EL                     |        

If making recurrent single payments, these will be held in the IB bank account until your adviser instructs us to transfer the money over to the Elevate GIA. The adviser will then be responsible for setting up the investment.

Elevate Portfolio Services Limited trades as Elevate and is part of Standard Life Aberdeen group. Elevate Portfolio Services Limited (01128611) is registered in England at 14th Floor, 30 St.Mary Axe, London EC3A 8BF and authorised and regulated by the Financial Conduct Authority.
Part 22 – Deposit accounts
Only complete if you wish to invest in deposit/structured deposit accounts.

<table>
<thead>
<tr>
<th>Account name</th>
<th>£ or %</th>
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</thead>
<tbody>
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</tbody>
</table>

Part 23 – Managed Portfolio Service (MPS)
Only complete this section if you wish to invest in the Managed Portfolio Service provided by Aberdeen Standard Capital**.
If you have selected a portfolio you should also complete the MPS application form (ASCMPS46). Mark a cross in the box to confirm you will send in with this form.

**Aberdeen Standard Capital Limited (SC317950) is registered in Scotland at 1 George Street, Edinburgh EH2 2LL and is authorised and regulated by the Financial Conduct Authority.

Part 24 – Discretionary Investment Manager (DIM)
Only complete this section if you wish us to appoint a discretionary investment manager.
Please cross box to indicate the type of service the discretionary manager will be providing.

- Discretionary
- Advisory

Complete this section to appoint Aberdeen Standard Capital

1. Name: Aberdeen Standard Capital

2. How much do you wish us to send? £ OR %

Or complete this section to choose another discretionary investment manager from the range available

1. Name

2. How much do you wish us to send? £ OR %

If you have been recommended the Enhanced Discretionary option, please confirm that your Financial Adviser has communicated the restrictions which apply (Please check with your adviser if you are uncertain)

Part 25 – Regular Disinvestments
We will set up a regular disinvestment with your DIM Portfolio/Elevate GIA, to fund the IB bank account to cover charges and withdrawals. Please confirm the following:

Frequency DIM
- Yearly
- Half yearly
- Quarterly

Frequency Elevate
- Yearly
- Half yearly
- Quarterly

We will calculate the required amount of the regular disinvestment based on the frequency selected. We will contact the DIM provider to set up the regular disinvestment on your behalf.

Your adviser will set up the regular disinvestment on the Elevate platform.

We will automatically hold back enough monies in the IB bank account to cover charges and/or withdrawals until the first regular disinvestment is paid.

Note: It is your responsibility to ensure there is enough money in the IB bank account to cover charges and withdrawals. If you or your adviser make any changes to regular withdrawals and/or adviser charges, you should notify us to amend the regular disinvestment.
Part 26 – Phased investment option

You can only invest in insured funds and mutual funds under the phased investment option. The minimum amount for Phased Investment is £10,000.

This option invests your money over a selected period, gradually investing – rather than all at once.

We will invest an equal amount each month, for 3, 6, 9 or 12 months, up to the total amount allocated. The money will initially be placed into the IB bank account and then invested in your chosen funds from there.

The amount will be split into equal payments after any adviser charges and/or product charges have been deducted. Any future charges may affect the final payment to be invested.

If there is not enough money in the IB bank account to meet a monthly payment, we will not make that payment and the phased investment instruction will stop.

It is your responsibility to make sure there is enough money in the IB bank account (part 20) to cover the investment plus any charges.

Amount to be invested under the phased investment option: £

How many equal monthly payments do you want your investment split over?

3 months 6 months 9 months 12 months

Your phased investment will be made each month on the same day of the month as your investment starts or within 2 working days if that day falls on a bank holiday or a weekend.

If you want your phased investment to be made on a specific date each month, please state the date here. You can choose any date from the 1-28 of the month (DD/MM/YYYY).

Phased investment fund choices

<table>
<thead>
<tr>
<th>Fund code/Citicode</th>
<th>Fund name</th>
<th>£ or %</th>
</tr>
</thead>
<tbody>
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</table>

We may need to round your investment down to the nearest penny in some instances.

Please ensure you have read the relevant supplementary information document (SID) and/or Key Investor Information Document (KIID) before you select the fund.

Where there isn’t a SID/KIID available, e.g. for certain whole of market funds, you should ensure you read the relevant investor information document.

You can get copies of these documents from your financial adviser.

Please photocopy this page if selecting more funds.
### Part 27 – Regular withdrawals

The minimum regular withdrawal payment is £200 or £250 for a Discounted Gift Plan. If you want to take regular withdrawals from your bond, show the **percentage of the total amount** invested you want to withdraw **each year**.

Cross the appropriate box to show how often during the year you want to take withdrawals.

- Yearly
- Half yearly
- Quarterly
- Monthly

On what date do you want your first regular withdrawal to be paid? Payments can be made from **1-28** of the month (DD/MM/YYYY).

(Where applicable this must match the date chosen on the trust deed)

#### Notes for Discounted Gift Plans

- Percentage amount must be in 0.05% increments. Withdrawals can’t start within the first 30 days after your bond is set up.
- Withdrawals are subject to rounding to two decimal places. We will pay your first withdrawal at the next available date as chosen on your trust deed.

#### Authority for withdrawal payment

Please complete the section below if you want to take immediate withdrawals.

<table>
<thead>
<tr>
<th>Name of account holder</th>
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</thead>
<tbody>
<tr>
<td>Name of bank/ building society</td>
<td></td>
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<tr>
<td>Branch</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account number</td>
<td></td>
<td>Sort code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name of account/ roll number</td>
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<tr>
<td>IBAN: International bank account number (if applicable)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Bank SWIFT code (if known)</td>
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</tbody>
</table>

#### Notes

- Withdrawals can’t start within the first 30 days after your bond is set up.
- You cannot take withdrawals of more than 10% a year.
- Withdrawals may not be allowed when an active direct debit is in place to make recurrent single payments.
- Any adviser charges taken from within the bond will form part of your 5% annual tax deferred allowance.
- If you have chosen the Capital Redemption option, any withdrawals will result in a proportionate reduction in the Guaranteed Maturity Value.
Part 28 – How you want to pay your adviser

We will use the information you provide in this section to pay your financial adviser. By signing part 34 of this form, you are also:

• agreeing to the payment of the adviser charges documented in parts 29/30/31, and
• authorising Standard Life International to accept all future instructions from your adviser for payment of adviser charges that you have agreed to pay them from your bond, or from your payment.
• If you have chosen the Capital Redemption option, any adviser charges taken from within the bond will result in a proportionate reduction in the Guaranteed Maturity Value.

You do not need to complete the information in parts 28, 29 and 30 if:

• your financial adviser is billing you directly for their services, or
• your financial adviser is not charging you for their services.

Part 29 – Adviser charge for single payments

Complete this section if you will be making a single payment to your bond and you have agreed a charge for advice with your adviser.

Initial adviser charge

You can ask us to deduct this charge in one of two ways:

Option a

deduct the charge from the money you send us before the payment is invested in the segments in your bond;
Amount to be paid to your adviser £

Option b

deduct the charge from the money you send us after the payment is invested in the segments in your bond.

We recommend that you take appropriate independent tax advice before asking us to facilitate any adviser charges from within your bond as this will form part of your 5% tax deferred withdrawal allowance.

Amount to be paid to your adviser £ OR %. 

Please be aware that if there is a difference between the adviser charges requested on the personal illustration and the basis selected on this application form, then we will use the details on this application form.

If you choose option (a) the money will be deducted from the payment that you send us and reduce the amount invested in your International Bond.

Part 30 – Ongoing adviser charge

Complete this section if you have agreed to pay your adviser a percentage of the bond value or a regular set amount for ongoing advice in relation to your bond. Ensure you keep enough money in the IB bank account to cover these charges.

1. Percentage of bond value %

This percentage can be taken once a year or split across a different time period:

Monthly Quarterly Half-yearly Yearly

If you have chosen to pay ongoing adviser charges as a percentage of the value of your bond, and that value increases, the actual amount of the ongoing adviser charge will also increase. You may need to check if the 5% tax deferred withdrawal allowance is exceeded in any policy year, as this allowance is based on the payments you make to the bond, not the total value of the bond. This is especially important if withdrawals are taken.

OR

2. Set amount

£ every month £ every year

£ every quarter £ every half-year

When an ongoing adviser charge is selected as a % of the value of your bond, we will round down the calculated amount to the nearest amount that is divisible, to 1 whole penny, by number of segments held within the bond. Any outstanding amounts will be carried over to the next ongoing adviser charge payment.

When adviser charges are paid from your bond, we will round down any amounts selected which are not divisible, to the nearest pence, by the number of segments (‘policies’) chosen in part 16 of this form.
Part 31 – Adviser charge for recurrent single payments

Complete this section if you will be making recurrent single payments to your bond and have agreed a charge for advice with your adviser (either as one payment or spread over a period of time).

Spread payment of regular initial adviser charge (please complete one of the following options)

£  a month for  months.

£  a year for  years.

£  a quarter for  quarters.

£  a half-year for  half-years.

Part 32 – Declaration

Please ensure that all trustees (bond owners) and settlors (where indicated), read the Data protection notice, part 32, and declarations, parts 33a/33b, and confirm acceptance of these declarations by completing and signing parts 34c/34d/34e.

Part 33 – Data Protection Notice and Communication Preferences – Important, please read

Data Protection Notice – Using your Personal Information

We will collect and use personal information about you and any other named individual on your application such as your name, date of birth and national insurance number in order to provide this product or service and manage our relationship with you. It may be necessary as part of this product or service to collect and use personal information which is defined as ‘special category data’ by data protection law e.g. Health related. Any such special category data will only be collected and used where it’s needed to provide the product or service you have requested or to comply with our legal and regulatory obligations and where we have obtained your explicit consent to process such information.

To provide this product or service and meet our legal and regulatory obligations, we will keep your personal information and copies of records we create (e.g. calls with us) while you are a customer of ours. If this application does not proceed or when you no longer have a relationship with us, we are required to keep information for different legal and regulatory reasons. The length of time will vary and we regularly review our retention periods to make sure they comply with all laws and regulations.

The information collected may be shared with other parts of Standard Life Assurance Limited, Standard Life Aberdeen plc, Phoenix Holding Group (PHG) and other companies we work with to support us in the provision of the product or service you have with us. We may also share your information with our regulators, the Revenue Commissioner and your adviser/employer (for applicable products and services) where necessary and lawful to do so. Whenever we share your personal information, we will do so in line with our obligations to keep your information safe and secure.

The majority of your information is processed in the UK and European Economic Area (EEA). However, some of your information may be processed by us or the third parties we work with outside of the EEA, including countries such as the United States and India. Where your information is being processed outside of the EEA, we take additional steps to ensure that your information is protected to at least an equivalent level as would be applied by UK/EEA data privacy laws e.g. we will put in place legal agreements with our third party suppliers and do regular checks to ensure they meet these obligations.

For more information on how Standard Life processes your personal information and what your rights are, please read our Privacy Policy at https://www.standardlife.ie/data-protection-notice or write to the Data Protection Officer (ROI), Standard Life International, 90 St. Stephen’s Green, Dublin 2
Part 33 – Data Protection Notice and Communication Preferences – Important (continued)

Communication Preferences
Your essential updates
We’ll share important information on your plan and your choices, products and services, plus financial tips from our experts.
We also want to help you plan for the future by keeping you updated on:

- Latest news and offers from Standard Life Aberdeen PLC
- No [ ] Yes [ ]

For information about Standard Life Aberdeen companies visit StandardLifeAberdeen.com
To understand how, where and why we use your information, read our Privacy Policy
https://www.standardlife.ie/data-protection-notice
Part 34a – Accessing the Elevate platform (to be signed by your financial adviser)

The following terms apply where the bond owner selects the Elevate GIA as an investment option. Discretionary Investment Management on Elevate is not automatically available. Please check with us first as to whether an appropriate agreement is in place between us and the relevant Discretionary Investment Manager before seeking to use this functionality on the Elevate platform.

Authorisation

Standard Life International authorises the financial adviser named on this form to open the GIA with Elevate in our name and place investment instructions directly on the Elevate platform, where the bond owner has agreed to this, and on the terms set out below. By signing this section, you accept such authorisation and confirm your agreement to these terms. Please note these terms are supplemental to and should be read with the Intermediary Terms of Business.

In accepting such authorisation, you undertake, confirm and agree that:

1. you have all the rights necessary to perform your obligations under these terms;
2. you will notify us as soon as you become aware of any breach of these obligations or developments which may (or has) impacted your ability to comply with the terms or applicable laws;
3. you will only select a Discretionary Investment Manager if we have agreed to this. You have entered into an agreement with Elevate to access their platform and you will comply with the terms of that agreement. In particular, if you provide the bond owner with read-only access to the Elevate platform, you will ensure that you and the bond owner keep passwords secret and secure and you do not misuse or do anything to compromise the security of the Elevate platform;
4. the bond owner has authorised you to place investment instructions on the platform in relation to their bond’s investment in the Elevate GIA, and you will immediately notify us of any restrictions on, or removal of, your authority;
5. the authorisation we have given you is limited to those powers to instruct the trading of investments (as conferred to the bond owner by us under the Policy Provisions and you will not exceed this authority;
6. you will ensure that any investment and dealing instructions you send to Elevate comply with our permitted investment requirements as set out in the Policy Provisions and acknowledge we have the right to override or cancel any investments which may be proposed/made, as well as the right to adjust or refuse any directions the bond owner provides to you;
7. you will advise the bond owner as to the suitability of the investments to be held in the Elevate GIA, based on their needs, investment objectives, strategy and risk profile, and in accordance with our permitted investment requirements;
8. we are not responsible for the advice you provide or suitability of the investments and do not recommend or provide any warranty as to suitability or performance of the Elevate GIA platform;
9. you will manage the Elevate GIA portfolio in good faith and with all due care and diligence;
10. all relevant charges have been disclosed to the bond owners;
11. the bond owners are aware that adviser charges are not payable from the Elevate GIA;
12. you must sell investments when we require money to cover any outstanding charges, withdrawals, cash-ins or as otherwise required by us under the bond Policy Provisions (IB62CRB);
13. you will not assign your rights under these terms without our prior written consent;
14. we may terminate your authorisation to place investment instructions on the Elevate platform at any time, for example if you cease to be authorised by the FCA or relevant regulatory body.

You agree to fully indemnify and keep us (and the relevant member of the Standard Life Aberdeen group) fully indemnified against any losses or claims arising as a result of the services you perform regarding the Elevate GIA and/or any breach of these terms.

Adviser signature

Date (DD/MM/YYYY)
Part 34b – Declaration to be read and accepted by all trustees

For your own benefit and protection you should read the Data Protection Notice above. If you do not understand any point, please ask us or your financial adviser for further information.

1. I/We agree that my/our personal information (including special category data) may be used for the purposes described (subject to me/us exercising my/our right not to be contacted with details of other products and services).

2. I/We, the person(s) taking out the bond in which I/we have an interest, agree that the answers given in this form are true and complete to the best of my/our knowledge and belief, and that the answers to any questions which the life/lives assured (where relevant) may be asked in connection with this application, will form part of this application.

3. I/We (where the bond owner is an individual) declare that my/our principal home is in the UK, Channel Islands or the Isle of Man and that I am/we are habitually resident in the UK, Channel Islands or the Isle of Man.

4. We (where the bond owner is a company) declare that the company is incorporated in the UK, Channel Islands or Isle of Man.

5. I/We agree to my financial adviser receiving the adviser charge(s) described in parts 28-31 and authorise Standard Life International to accept all future instructions from my financial adviser to pay the charges that I/we have agreed with my/our financial adviser.

6. I/We understand that I/We can access the relevant investor information documents (such as KIIDs and SIDs) for my/our chosen funds (where available) through my/our financial adviser or by calling Standard Life International.

7. I/We agree that the contract between myself/us and Standard Life International will be governed by the policy schedule and policy provisions.

Part 34c – Declaration for policyholders’ resident outside Ireland

Policyholders resident outside Ireland are required by the Irish Revenue Commissioners to make the following declaration, which is in a format authorised by them, in order to receive payments without deduction of Irish tax.

I/We declare that:

1. I/we have read the explanation of the terms detailed in the notes entitled ‘Residence Definition’ below

2. I am/we are/the company is the policyholder in respect of which this declaration is being made;

3. I am/we are/the company is not resident or ordinarily resident in Ireland; and

4. I/we/the company hereby undertake to inform Standard Life International of any change in my/our/the company’s country of residence during the life of the policy.

Residence Definition – Individual

An individual will be regarded as being resident in Ireland for a tax year if she/he:

1. Spends 183 days or more in Ireland in that tax year; or

2. Has a combined presence of 280 days in Ireland, taking into account the number of days spent in Ireland in that tax year together with the number of days spent in Ireland in the preceding year.
Part 34c – Declaration for policyholders’ resident outside Ireland (continued)

Presence in a tax year by an individual of not more than 30 days in Ireland will not be reckoned for the purpose of applying the two-year test. Up to 31 December 2008, presence in Ireland for a day means the personal presence of an individual at the end of the day (midnight). From 1 January 2009, presence in Ireland for a day means the personal presence of an individual at any time during the day.

Ordinary Residence Definition – Individual
The term “ordinary residence” as distinct from “residence” relates to a person’s normal pattern of life and denotes residence in a place with some degree of continuity. An individual who has been resident in Ireland for three consecutive tax years becomes ordinarily resident with effect from the commencement of the fourth tax year.

An individual who has been ordinarily resident in Ireland ceases to be ordinarily resident at the end of the third consecutive tax year in which she/he is not resident. Thus, an individual who is resident and ordinarily resident in Ireland in 2004 and departs from Ireland in that year will remain ordinarily resident up to the end of the tax year in 2007.

Residence Definition – Company
Prior to Finance Act 2014, company residence was determined with regard to the long established common law rules based on central management and control. These rules were significantly revised in Finance Act 2014 to provide that a company incorporated in Ireland will be regarded as resident for tax purposes in Ireland, unless it is treated as resident in a treaty partner country by virtue of a double taxation treaty. While the common law rule based on central management and control remains in place, it subject to the statutory rule for determining company residence based on incorporation in Ireland set out in the revised section 23A TCA 1997.

The new incorporation rule for determining the tax residence of a company incorporated in Ireland will apply to companies incorporated on or after 1 January 2015. For companies incorporated in Ireland before this date, a transition period will apply until 31 December 2020.

Before signing your application please review against the avoiding delays checklist on page 2.

Part 34d – Settlors who are not trustees

<table>
<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Date (DD/MM/YYYY)</th>
<th>Corporate settlor – authorised signatory</th>
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Signature

If there are more than two signatories please photocopy this page.
### Part 34e – Trustees signatures

<table>
<thead>
<tr>
<th>Trustee</th>
<th>Name</th>
<th>Signature</th>
<th>Date (DD/MM/YYYY)</th>
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Note: the Trust deed must be dated before this application.

If there are more than four signatories please photocopy this page.

### Part 34f – Corporate Trustee – To be signed by named authorised signatories

<table>
<thead>
<tr>
<th>Authorised signatory</th>
<th>Name</th>
<th>Signature</th>
<th>Date (DD/MM/YYYY)</th>
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<th>Authorised signatory</th>
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### Part 34g – Trust Protector – To be signed by named authorised signatories

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<th>Authorised signatory</th>
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<td>Signature</td>
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<td>Date (DD/MM/YYYY)</td>
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### Part 34h – Are you a Politically Exposed Person?

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations, and apply enhanced customer due diligence procedures. A PEP is an individual who is, or has at any time in the preceding 12 months been entrusted with one of the positions listed below:

1. Heads of State, heads of government, ministers and deputy or assistant ministers
2. Members of courts of auditors or of the boards of central banks;
3. Members of the governing bodies of political parties;
4. Members of supreme courts, of constitutional courts or of other high-level judicial bodies, the decisions of which are not subject to further appeal, except in exceptional circumstances;
5. Members of courts of auditors or of the boards of central banks;
6. Ambassadors, chargés d'affaires and high-ranking officers in the armed forces;
7. Members of the administrative, management or supervisory bodies of State-owned enterprises;
8. Directors, deputy directors and members of the board or equivalent function of an international organisation.

Are you (or either of you under a joint application), or any other party to this application, now, or previously been a PEP or a relative or close business associate of a PEP?

No [ ] Yes [ ]

If ‘Yes’ please confirm your –

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<tr>
<th>First Name</th>
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<tr>
<td>Last Name</td>
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<tr>
<td>Position Held</td>
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<tr>
<td>Date</td>
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<tr>
<td>Role on the policy (e.g. Life Assured or Beneficial Owner)</td>
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