

International Bond from Standard Life International

Application form for additional payments — Individual / Trust

Who this form is for

This form is for investment in the Standard Life International Bond by:

individuals who want to make an additional investment

or

trustees of an existing trust who want to make an additional investment*

or

trustees of a new gift plan where an existing bond has been transferred to that trust and the trustees are making an additional investment at the same time.

This form should only be used if the bond holder details and financial adviser details have not changed. If these details have changed or you want to use the phased investment option, you should complete the relevant full International Bond Application form.

* Trust investment:

Additional investments to an existing bond and/or recurrent single payment are only available if you have a Gift Plan. Additional payments cannot be made to Discounted Gift Plan, Flexible Reversionary Plan or Loan Plan.

If you want to start taking withdrawals, or want to increase the amount you are already taking, you will need to complete our 'Instruction to take regular withdrawals or cash in all or part of your International Bond' form (IB3OSUR).

IB31 0321



This application is only for use by applicants who are habitually resident in the UK, Channel Islands or the Isle of Man. Please ask your financial adviser if you require any guidance.



Call **0345 300 4273**. Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.

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 payment to proceed.

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).

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.

Part 2 – Source of Wealth

The section has been fully completed

Part 7 – International Bond Bank Account

Assign money to the IB Bank Account

Part 8 – Investment Funds

Citi codes and/or insured fund codes (www.adviserzone.com)

Investment total 100% including IB bank account

Parts 9 to 12 – Adviser charges

Completed for this investment

Part 1 – Details of your investment

Name of first bond holder

Bond number:

I B

Additional payments cannot be made to Discounted Gift Plan, Flexible Reversionary Plan or Loan Plan.

Part 2 – Source of Wealth

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 investments Policy claim/maturity

Inheritance Savings Existing trust

Salary/bonus Sale of company Sale of property

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.



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

In some cases, we may require documentary evidence to verify the information supplied in this section.

Please continue on a separate piece of paper if necessary.

Part 4 – Recurrent single payment (Not available on Loan Plans, Flexible Reversionary 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 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.

If investing via an Elevate General Investment Account (Elevate GIA)*, recurrent single payments will be held in the IB bank account until your adviser instructs us to transfer the money over to Elevate. 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 6 – Your choice of investments

You can choose to invest in Standard Life insured funds, mutual funds, whole of market funds, the 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.

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.

Part 12 – 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)

£	<input type="text"/>	.		a month for	<input type="text"/>	months.
£	<input type="text"/>	.		a year for	<input type="text"/>	years.
£	<input type="text"/>	.		a quarter for	<input type="text"/>	quarters.
£	<input type="text"/>	.		a half-year for	<input type="text"/>	half-years.

If you're only making one payment to your adviser, you can enter '1' here – eg £100 a month for 1 month.

Part 13 – Declaration to be read and accepted by all the bond owner(s)

Please ensure that all bond owners, trustees and powers of attorney read the declaration below and confirm acceptance of these declarations by completing and signing Part 14 on page 10.

I/We, the person(s) making an additional payment to this 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 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.

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

Part 14 – Bond owner(s), trustees and powers of attorney signatures	
Person 1	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	
Person 2	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	
Person 3	
Name	<input type="text"/>
Signature(s) ▶	<input type="text"/>
Date (DD/MM/YYYY)	<input type="text"/>
Please state the capacity in which you are signing if you are not the bond owner	
<input type="text"/>	



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



Signature(s)



Signature(s)



Signature(s)

Data Protection Notice
<p>Data Protection Notice – Using your Personal Information</p> <p>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.ie/privacy</p>

If you're providing information about another person, we encourage you to inform the individual that you have provided this information and suggest they read our privacy policy to understand how we manage and use their data.

Standard Life International dac is part of the Phoenix Group and uses the Standard Life brand under licence from the Standard Life Aberdeen Group. You can find out more about the strategic partnership between the Phoenix Group and Standard Life Aberdeen Group at www.thephoenixgroup.com

Standard Life International dac is authorised and regulated by the Central Bank of Ireland. Deemed authorised by the Prudential Regulation Authority. Subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. The nature and extent of consumer protections may differ from those for firms based in the UK. Details of the Temporary Permissions Regime, which allows EEA-based firms to operate in the UK for a limited period while seeking full authorisation, are available on the Financial Conduct Authority's website.

Standard Life International dac is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, Dublin 2. www.standardlife.co.uk/International-Bond

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