

Who this form is for

This form is for employees and/or employers who wish to make payments to the Retirement Account Plan the employer has arranged with Standard Life. This form can be used for new entrants and increments. When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

RAP30 0621

Filling in this form

Before completing this form, please ensure that you read Part 6 – Member's Data Protection Notice – and read and sign Part 7 – Member's declaration. Please note that failure to give correct answers could invalidate your Application.

A copy of the standard terms and conditions relating to the contract and a copy of your completed Application form will be sent to you on request.

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.

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.



If you have any problems completing this form, please speak to your financial adviser or Standard Life.

Part 1 – Your personal details

National Insurance Number	<input type="text"/>	Date of birth (DD/MM/YYYY)	<input type="text"/>
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	<input type="text"/>	Male <input type="checkbox"/>	Female <input type="checkbox"/>
		Normal Retirement date (DD/MM/YYYY)	<input type="text"/>
Surname	<input type="text"/>		
First name(s) in full	<input type="text"/>		
Address			
House number	<input type="text"/>		
Street	<input type="text"/>		
City/Town	<input type="text"/>		
County	<input type="text"/>	Postcode	<input type="text"/>
Telephone number (inc area dialling code)	<input type="text"/>		
Home	<input type="text"/>		
Business	<input type="text"/>		
Department	<input type="text"/>		
Employee Reference Number	<input type="text"/>		
Marital status	Single <input type="checkbox"/>	Married/Civil partnership* <input type="checkbox"/>	Separated <input type="checkbox"/>
	Widowed/Surviving civil partner* <input type="checkbox"/>	Divorced/Dissolved civil partnership* <input type="checkbox"/>	

*A civil partnership is a legal contract between two partners of the same or opposite sex.

Part 2 – Details of payments

You can make payments to increase your retirement benefits. Please note all payments must be made through your employer.

Regular payments

First payment date (DD/MM/YYYY)

Member regular payments

If you are joining a scheme which commenced before 1st February 1992, regular payments must be expressed as a flat amount. If you are joining a scheme which commenced after this date, you may have to express your payments as a percentage of your earnings. Please note that regular payments cannot be started unless two years' payments can be paid before Normal Retirement Date (NRD).

Please complete the following boxes indicating the amount you wish to pay and how often. % £ Monthly OR Weekly OR 4 Weekly

If your payments are going to be paid as a percentage of your earnings, please give the earnings or expected earnings on which the first year's payments are to be based. Your employer will be able to provide you with this information. £

Employer regular payments

% £ Monthly OR Weekly OR 4 Weekly

Single payment

You and/or your employer can normally make a single payment at any time. The minimum single payment is £1,000 (unless you and/or your employer is already making regular payments, or have made a single payment, in which case the minimum is £500). Please note that a single payment can only be made within one year of NRD if the amount is at least £1,500 and the term to NRD is at least two months.

Please indicate the amount of single payment to be made
By you £ By your employer £



If you are joining a scheme on which we reduced the number of our charges on 25th February 2002, your payments must be monthly.

Your employer/financial adviser will advise you of the basis for making regular payments to the plan i.e. whether you pay a flat amount or a percentage of your earnings and the frequency of the payment.

Both member and employer must pay on the same basis, e.g. flat amount paid on a monthly basis.

If you have any questions regarding payments, your employer/financial adviser will answer them for you.

Part 3 – Money Laundering Regulations

To comply with Money Laundering Regulations, we may verify your identity, by carrying out an online check with a reference agency. Where an online check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties. We regret that we cannot offer an alternative unless the online check does not confirm your identity, in which case we will carry out a manual check.

You may only complete Part 4 if you are making regular payments.

If you are joining a scheme on which we reduced the number of our charges on 25th February 2002, any life cover will be paid by cancelling units in your fund each month (Pay-As-You-Go basis). If you are joining a scheme set up on a single charge basis, any life cover payments will be made monthly. This is included within the payments which are paid into your plan each month and will be shown in your personal illustration.

Part 4 – Protecting your family

Please complete this section if you want to arrange additional life cover and/or a dependant's pension. If not – go to Part 5.

If you die before you start to take your benefits, the fund that has been built up will be paid according to the rules of the scheme. However, you may wish to arrange additional life cover.

Additional Life Cover

This will provide your dependants with a specified lump sum in addition to the value of your pension fund.

Please indicate the amount of cover you require. £

Part 4 – Protecting your family (continued)

Minimum Death Benefit

This option is only available to new members joining a scheme on which we reduced the number of our charges on 25th February 2002.

This will provide your dependants with either a specified lump sum or the value of your pension fund, whichever is greater.

Please indicate the amount of cover you require. £

Dependants' Pension

This will provide your dependant(s) with a pension if you die in service. If you require this please complete the following section.

Sex of dependant (Male/Female)	Date of birth (DD/MM/YY)	Relationship to you (E.g. spouse/civil partner/child/parent/other)	Pension amount £ a year

Health Questionnaire

If you have completed this part, you must complete a supplementary **Health Questionnaire**, which will then form part of this Application.

Life cover must cease if you remain in service with your employer after your Normal Retirement Date or if regular payments cease.

Ask your employer/financial adviser to provide you with a Health Questionnaire if you do not already have one.

Part 5 – Your investment choices

Please choose your investment option(s) from your plan's 'How to choose the right investment options for your pension' guide, and complete the details below. You can invest in more than one fund, but the percentages must add up to 100%. If you choose a lifestyle profile, you can only combine this with the with profits fund which is available through your plan; you can't invest in any other funds or lifestyle profiles. The 'How to choose the right investment options for your pension' guide will tell you which with profits fund is available.

Fund/Profile code	Fund/Profile name (in full)	%
Total (Please ensure the total percentage adds up to 100%)		100 %

Your employer/financial adviser will advise you whether the option of choosing your funds is available to you.



Important:

You must include the fund/profile code(s) and full fund/profile name(s) on this form for us to process your application. If we don't have this information, we may have to return your application.

Please see the 'How to choose the right investment options for your pension' guide for more information about how lifestyle profiles work and the options available.


You can invest in 12 funds at any one time, except if you've chosen a lifestyle profile. The maximum number of different funds you can invest in during the term of your plan is 20.

Part 6 – Data Protection Notice

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: <https://www.standardlife.co.uk/privacy/standard-life-assurance-limited>

Part 7 – Member's declaration

I have had the opportunity to read 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).

Signature		<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>
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Signature required.

Part 8 – Trustees' signature

For and on behalf of Trustees		<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>
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Name of Employer	<input type="text"/>
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Financial adviser's details

Please enter company stamp

Intermediary Reference Number*

Name of contact

Location

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

Basis of Sale Whole of Market Other

If other please specify

*Maximum 25 characters.

Commission basis (only available on 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

Any Fund Based Commission (FBC) will be paid as per the current agreed scheme basis.

If you do not wish to take any commission for this member, please tick here.

N.B. Adviser charging is not available on this product.



Please note that commission is only payable if the group scheme was established on a commission basis before 31 December 2012 and payment of such is covered in an agreement between your employer and their adviser before that date.

Money laundering Money laundering form completed and attached

FSA or Authorisation number

