

Who this form is for

When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

This form is for anyone who wishes to become a member of their employer's Director's Premier SSAS or Director's Standard SSAS.

SAS30 0421



If you have enhanced protection, or any version of fixed protection, you should not complete this form until you speak with your financial adviser.

If you have flexibly accessed with any provider you should not complete this form until you speak with your financial adviser.

Filling in this form

Before completing this form, please ensure you read the Key Features Document (SAS17).

A copy of the standard terms and conditions of the Plan and the 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.

For Director's Standard SSAS

Payments to the Director's Standard SSAS must be made to both Standard Life's Retirement Account Plan (RAP) and Open Ended Investment Company (OEIC) funds.

If you are making payments by cheque, it is essential that you enclose two separate cheques. Please make these payable to Standard Life Assurance Limited for the RAP and Aberdeen Standard Fund Managers Ltd for the OEIC. If we do not receive separate payments, we will have to return your cheque.

Part 1 – Your personal details

Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>	Date of birth (DD/MM/YYYY)	<input type="text"/>	Male <input type="checkbox"/>	Female <input type="checkbox"/>
Surname	<input type="text"/>				
First name(s) in full	<input type="text"/>				
Marital status	Single <input type="checkbox"/>	Married/Civil partners <input type="checkbox"/>	Separated <input type="checkbox"/>	Divorced <input type="checkbox"/>	Widowed <input type="checkbox"/>
Home address					
House number	<input type="text"/>				
Street	<input type="text"/>				
City/Town	<input type="text"/>				
County	<input type="text"/>				
Postcode	<input type="text"/>				



If you are receiving advice from a financial adviser, you should remember that the adviser is acting on your behalf, not only by giving you advice, but also regarding the completion of this form.

Part 1 – Your personal details (Continued)

Telephone number

Home (inc STD code)

Business (inc STD code)

Mobile (inc STD code)

Occupation

National Insurance Number

What is your Gross Annual Income – please indicate which income band applies to you.

- Under £10,000 £10,000 to £14,999 £15,000 to £19,999 £20,000 to £24,999
 £25,000 to £29,999 £30,000 to £39,999 £40,000 to £49,999 £50,000 or more

Part 2 – Your employment details

Full name of your employer

Date of joining employer’s service (DD/MM/YYYY)

Normal retirement date (DD/MM/YYYY)

Part 3a – Regular payment details

Please provide details of how the payments will be invested showing the split between Standard Life’s:

a. Retirement Account Plan (RAP), OEIC and non-insured investment for Director’s Premier SSAS

- RAP £
- Non-insured investment £
- OEIC £

b. RAP and OEIC for Director’s Standard SSAS

- RAP £
- OEIC £

Please complete either a or b.



Please note that OEIC is an optional investment for Director’s Premier SSAS.

Part 3a – Regular payment details (Continued)

Now please complete the appropriate box to show how much you and your employer wish to pay to the RAP (and OEIC if applicable) and the selected method of payment. Regular payments can be made either monthly by Direct Debit or yearly by cheque or Direct Debit.

	Employer Ordinary £	Employee Ordinary £	Employee Voluntary £
Monthly by Direct Debit			
Yearly by cheque			
Yearly by Direct Debit			

Your payments are deducted from your salary before tax is paid.

Please complete the appropriate box to show when regular payments to the RAP (and OEIC if applicable) are to be made. The first payment cannot be made before the Starting Date of the Scheme. Regular payments to the RAP may be made on any day of the month except the 29th, 30th or 31st. All regular payments to the OEIC must be made on the 6th of the month.

RAP		OEIC (if applicable)	
Monthly, starting (DD/MM/YYYY)	<input type="text"/>	(the first payment date) (MM/YYYY)	<input type="text" value="06"/>
or			
Yearly, starting (DD/MM/YYYY)	<input type="text"/>	(the first payment date) (MM/YYYY)	<input type="text" value="06"/>
and yearly thereafter on (DD/MM)	<input type="text"/>	(the yearly payment date) (MM)	<input type="text" value="06"/>

For yearly payments where there is less than a full year between the first and the yearly payment date there is an option to pay a full year's payment on the first payment date.

Is a full year's payment to be made on the first payment date? Yes No



A full year's payment is due on the yearly payment date prior to the normal retirement date.

Part 3b – Single payment details

Please complete either a or b.

Only complete this part if a single payment is to be made.

Please provide details of how the payments will be invested showing the split between the:

a. RAP, OEIC and non-insured investment for Director’s Premier SSAS

• RAP	£	<input type="text"/>
• Non-insured investment	£	<input type="text"/>
• OEIC	£	<input type="text"/>

b. RAP and OEIC for Director’s Standard SSAS

• RAP	£	<input type="text"/>
• OEIC	£	<input type="text"/>

Single payments must be made by cheque. The minimum single payment to the RAP is £1,500. For Director’s Standard SSAS, payments to the OEIC must be the greater of 10% of the whole payment or £250.

• Single payment (Employer)	£	<input type="text"/>
• Single payment (Employee)	£	<input type="text"/>



Please note that OEIC is an optional investment for Director’s Premier SSAS.

Your payments are deducted from your salary before tax is paid.

Part 3c – Source of Wealth

Due to FCA requirements, we are required to obtain information about the source of your payment before we can accept your application. Please indicate below how you acquired the money you are investing.

Salary/Bonus <input type="checkbox"/>	Divorce Settlement <input type="checkbox"/>	Gift <input type="checkbox"/>
Inheritance <input type="checkbox"/>	Lottery/Betting win <input type="checkbox"/>	Policy claim/Maturity <input type="checkbox"/>
Compensation payment <input type="checkbox"/>	Sale of Investments <input type="checkbox"/>	Sale of property <input type="checkbox"/>
Sale of company <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>

If other, please specify

Part 4 – Transfer benefits

Is it intended to transfer benefits into the Scheme within the first 12 months? Yes No

If 'Yes', please provide some basic details of the proposed transfers (eg insurer, member, value to be transferred). This Small Self-Administered Scheme cannot accept the transfer of any Guaranteed Minimum Pension benefits.

Part 5 – Protecting your family

If you die before you have taken all of your benefits, your interest in the fund that has been built up will be used to provide benefits in accordance with the rules of the Scheme. However, you may choose to arrange extra life cover payable if you die in service.

Would you like to arrange extra life cover? Yes No

If you have ticked 'Yes', we will contact you separately to arrange cover.

Part 6 – Details of your dependant

Complete this part if a pension is to be payable on death in service.

Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>	Date of birth (DD/MM/YYYY)	<input type="text"/>	Male <input type="checkbox"/>	Female <input type="checkbox"/>
Surname	<input type="text"/>				
First name(s) in full	<input type="text"/>				
Relationship to you	<input type="text"/>				

?
A dependant will be a close relative or some other person who is financially dependent on you.

Part 7 – Money Laundering Notice

To comply with the Money Laundering Regulations we are required to verify the identity of our customers. We do this by carrying out an on-line identity check with a reference agency. This is not a credit check and will not affect your credit rating. The agency will verify your identity against public records and confirm whether you have a credit history (but will not disclose any information to us about your actual borrowings). The agency will add a note to your credit file to show that an identity check was requested by Standard Life. If successful, a copy of the results will be held by Standard Life to evidence that your identity has been verified. 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.

Part 8 – 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 9 – Employee’s declaration

1. I request that the benefit described in this application be provided for me and in consideration of its acceptance I undertake to be bound in all respects by the Trust Deed and Rules of the Scheme for the time being in force.
2. I agree the amount of employee payments to be made by me and I authorise their deduction from my pay.
3. I declare that to the best of my knowledge and belief the answers given in this application, whether in my handwriting or not, are correct and complete.
4. **I have had the opportunity to read the Data Protection Notice and I agree that my personal 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 

Date
(DD/MM/YYYY)

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Signature required.

For completion by your financial adviser or Standard Life

Financial adviser's details

Name of contact

Intermediary Reference Number

Location

Basis of Sale Whole of Market Other

If other please specify

Was advice given? No Advice (e.g. Execution only) Advice

FCA or Authorisation number

Agency Code

Maximum 25 characters.

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Standard Life Assurance Limited is registered in Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH.

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