

Who this form is for

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

This form is for anyone wishing to increase payments to a Standard Life SSAS. It should be completed by the Member and then passed to the Trustees, who should return the form to SSAS, Standard Life, Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH.

SAS31 0421



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.

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 ever flexibly accessed pension benefits 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 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.

Are payments to be made to Standard Life Open Ended Investment Company funds (OEICs)? Yes No

If you are making payments to both a Retirement Account Plan (RAP) and OEIC 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.

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.

Part 1 – Your personal details

Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>
Surname	<input type="text"/>
First name(s) in full	<input type="text"/>
Scheme reference number	<input type="text"/>
Scheme name	<input type="text"/>
Full name of your employer	<input type="text"/>
Occupation	<input type="text"/>

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 2a – Regular payment details

The SSAS accepts both regular and single payments. This part of the form should be completed when increasing regular payments. This increase should be made using the existing method of payment. Please provide details of how you want the increased payment split between the RAP, Standard Life Investment Company and other non-insured investment:

- RAP £
 - Open Ended Investment Company £
 - Other non-insured investment £
(Note: This option is not available Standard SSAS)
- Payments are to be **increased** by:
- Employer Ordinary (pm/py) £
 - Employee Ordinary (pm/py) £
 - Employee Voluntary (pm/py) £

Start date for the increased payment (DD/MM/YYYY)

If payments are made yearly and the date chosen is not the yearly payment date, please indicate if, on the date chosen, the payment will be:

- the full increase in the payment, or
- the proportion of the increase in the payment for the period up to the yearly payment date.

The minimum increase in regular payments to either the RAP or Standard Life Investment Company funds is £30 for monthly payments or £300 for yearly payments.

The additional payments to the RAP will be invested in the same funds and in the same proportions as the current level of payments. For Director's Standard SSAS at least 10% of the increase in payments must be invested in Standard Life Investment Company funds.

If payments are made yearly, this date will normally be the yearly payment date shown on the original application form.

Part 2b – Single payment details

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

Please provide details of how the single payment will be invested showing the split between the RAP, Standard Life Investment Company and other non-insured investment:

- RAP £
- Open Ended Investment Company £
- Other non-insured investment £

If a payment is being made to Standard Life Open Ended Investment Company Funds (OEICs), it is essential that you enclose a separate cheque made payable to Aberdeen Standard Fund Managers Ltd.

Single payments must be made by cheque. The minimum single payment is £1,500.

- Single payment – Employer £
- Single payment – Employee £

For Director's Standard SSAS, the minimum single payment to Standard Life Investment Company funds is the greater of 10% of the payment or £375.

Unless otherwise advised, the sum paid to the RAP and Standard Life Investment Company will be invested in the same funds and the same proportions as regular payments.

Part 2c – 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 3 – 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 4 – 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 5 – 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 on-line check does not confirm your identity, in which case we will carry out a manual check.

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 – Employee’s declaration

1. I agree the amount of the increase in employee payments to be made by me and I authorise their deduction from my pay.
2. 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.
3. 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)



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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