

Active Money Personal Pension

Date:

Customer name:

Plan number:

Authorisation form

Applying online

I, (CLIENT NAME & ADDRESS)

authorise my adviser (ADVISER NAME):

to apply online on my behalf for an Active Money Personal Pension from Phoenix Life Limited ("Standard Life")

I understand that Standard Life will send me a confirmation schedule containing all the information and declarations provided by my adviser on my behalf.

I understand that it's my responsibility to check that all the information given in the confirmation schedule is correct, in particular the level of adviser charges that I have agreed to pay to my adviser. I will contact Standard Life immediately if there are any errors or omissions.

Transfer payment declarations

My declaration to the administrators of the transferring schemes named below

- ▶ I authorise and instruct you to transfer funds from the plan(s) as listed in this application directly to Standard Life. Where you have asked me to give you any original policy document(s) in return for the transfer of funds, and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be a probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this application or with respect to benefits from the plan.
- ▶ I authorise you to release all necessary information to Standard Life to enable the transfer of funds to Standard Life.

Plan number:

- ▶ If applicable, I authorise you to exchange additional information as required with my financial adviser to enable the transfer of funds.
- ▶ If an employer is paying contributions to any of the plans as listed in this application, I authorise you to release to that employer, any relevant information in connection with the transfer of funds from the relevant plan(s).
- ▶ Until this application is accepted and complete, Standard Life's responsibility is limited to the return of the total payment(s) to the administrator of the transferring scheme.
- ▶ Where the payment(s) made to Standard Life represent(s) all of the funds under the plan(s) listed in this application, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from the plan(s) listed.
- ▶ Where the payment(s) made to Standard Life represent(s) part of the funds under the plan(s) listed in this application, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan(s) represented by the payment(s).

My declarations to Phoenix Life Limited, and the administrators of the transferring schemes.

- ▶ I promise to accept responsibility in respect of any claims, losses and expenses that Standard Life and the administrator of the transferring scheme may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

Plan number:

Transfer payment details – 1

Administrator name	<input type="text"/>	
Transferring scheme name	<input type="text"/>	
Reference/plan number(s)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Approximate fund value to be paid to Standard Life?	<input type="text"/>	

Transfer payment details – 2

Administrator name	<input type="text"/>	
Transferring scheme name	<input type="text"/>	
Reference/plan number(s)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Approximate fund value to be paid to Standard Life?	<input type="text"/>	

Transfer payment details – 3

Administrator name	<input type="text"/>	
Transferring scheme name	<input type="text"/>	
Reference/plan number(s)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Approximate fund value to be paid to Standard Life?	<input type="text"/>	

Transfer payment details – 4

Administrator name	<input type="text"/>	
Transferring scheme name	<input type="text"/>	
Reference/plan number(s)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Approximate fund value to be paid to Standard Life?	<input type="text"/>	

Ongoing Authorisation

I authorise Standard Life to accept instructions from (AGENT NAME):

during the lifetime of my plan to buy or sell investments under my plan.

I also authorise Standard Life to accept information provided by my adviser regarding the amount of the lifetime allowance I have used up and the value of retirement benefits I have already taken, or I am about to take, from other pension schemes or plans.

I further authorise Standard Life to accept any future instructions from my adviser to pay the charges that I have agreed to pay my adviser from my plan.

Signature

Date

Data Protection

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.com/sl/privacy-policy/slal.page>.