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AMPP30 1223

Who this form is for

Use this form to take out an Active Money Personal Pension (AMPP) with us for the first time, or if you wish to make additional transfer payments or set up a regular payment to an existing plan. Both you and your financial adviser (if you have one) are required to complete this form.

Filling in this form

If you have a financial adviser and they intend to submit your application online **and this involves a pension transfer and/or payment of any adviser charges**, there are two options available to you. You can either sign an Authorisation Form as part of the online submission process or return this application to Standard Life. However, only the following sections of this application need to be completed:

- Part 2 – Planholders details
- Part 3 – Details of transfer payments (if applicable)
- Part 5 – How you want to pay your adviser (if applicable)
- Part 7f – Reminders and your signature
- Part 7h – Electronic submission declaration

Please use black ink and BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to fix a mistake, please initial any changes you make.



When we refer to ‘Standard Life’ in this document we mean Phoenix Life Limited trading as Standard Life.

We will provide you with a copy of this form and the terms and conditions of the contract on request.

Other forms you may wish to complete in addition to this form

‘Confirmation of Verification of Identity – Corporate and Other Non-Personal Entity’ form (AA48A) – If your employer is making payments to your plan you must also enclose this form, together with a Direct Debit Mandate from your employer’s bank account. Your financial adviser can obtain these forms online.

Application form for third party payments (SLSIP33) – Anyone who wishes to make a payment on your behalf should complete this form. This means parent, son, uncle, etc and does not refer to an employer.

Please complete the following parts:

Part	Title	When to complete?	Page(s)
Part 1	Money laundering, sales advice etc	Your financial adviser (if any) will complete	2
Part 2	Planholder’s details	This section is all about you – and you must complete this part	3-4
Part 3	Details of transfer payments	If you’re transferring another pension to Standard Life, you should complete this section with information about that pension.	4-7
Part 4	Payments	If you or your employer will make any regular or single payment(s)	8-10
Part 5	How you want to pay your adviser	You only need to complete this section if you are dealing with an adviser and are paying them for their services	11-12
Part 6	Where would you like to invest your transfer, single and regular payments?	You must complete this part	13
Part 7	Important information and declarations	You must complete this part	14-18

Part 1 – Money Laundering, sales advice and financial adviser details

If you're using a financial adviser, they will complete this section.
If you do not have an adviser, go straight to Part 2.

Money Laundering

To comply with the Money Laundering Regulations of 2007 please complete the following:

Identity of applicant verified

I/We confirm that:

- The information in Part 2 was obtained by me/us in relation to the customer, and
- The evidence I/we have obtained to verify the identity of the customer meets the standard evidence set out within the guidance for the UK Financial Sector issued by the JMLSG.

Please place cross in box.

Sales advice details

1. Basis of sale Whole of market Other

If 'Other', please specify

Sales advice – We will return this form for transfer business if you do not complete this part.

2. Please confirm that advice has been given Yes No

3. We can confirm the Bank verification we received is sufficient to demonstrate our client's ownership of this bank account.

We can confirm this document was received at a direct one to one meeting with our client OR that we have spoken with our client to verify the documentation received from them by e mail or post was issued by our client and this is not a fraudulent request.

4. I confirm that any Adviser Charges paid from this pension plan meet the HMRC requirements to be authorised member payments and therefore will be as a result of a genuinely commercial remuneration arrangement I have with the planholder, will be an appropriate amount for the advice or services provided and will only be for advice or services given in relation to this pension plan.

By completing this part, you are confirming that you are taking responsibility for submitting this piece of business for your client.

Financial adviser details and signature

Business writer name(s)

Agency name

Agency code

Name of regulator

FCA or authorisation number

Signed



Adviser's signature required.

Date (DD/MM/YYYY)

Signatory's name

Position

Contact's name

Telephone – Office

Telephone – Mobile

Email address

Contact – Who should we contact with any questions about this application?

Part 2 – Planholder’s details

1. Plan number

2. Title
(Mr/Mrs/Miss/Ms/
Other eg Dr/Rev)

3. Sex Male Female

4. Surname

5. First name(s)
in full

6. Date of birth
(DD/MM/YYYY)

7. National
Insurance
number

If you are an **existing AMPP customer** and your details haven’t changed, after answering questions 1 to 7, you can go to Part 2a.

If you are a **new AMPP customer**, please also answer questions 8 to 13 before moving on to Part 2a.

The information supplied will be held in the strictest confidence and subject to the provisions of Data Protection legislation.

8. Marital status
Single Married/
civil partnership Separated
Divorced/dissolved
civil partnership Widowed/surviving
civil partner

9. Address

House
number

Street

City/Town

County

Postcode

10. Telephone (include area dialling code)

Work

Home

Mobile

11. Email
address
@

12. At what age are you planning to take your benefits? Age

We need to use this age in any illustrations we provide for you. If you do not supply an age (for example, because you are not planning to buy an annuity in the future) we will assume a default age of 75 wherever possible.

1. Existing Standard Life
AMPP customers only

7. Please note that we cannot
process your application
for a new plan without a
valid National Insurance
number (you can normally
find this on your payslip).

12. The minimum age
that you can take your
benefits is usually age
55 (rising to 57 in 2028).
If you are transferring as
part of a block transfer
you may be able to take
your benefits earlier
than age 55 (rising to
57 in 2028). There is no
maximum age. Speak to
your financial adviser for
further details.

Part 2 – Planholder’s details (continued)

13. Are you currently

Employed	<input type="checkbox"/>	Self-employed	<input type="checkbox"/>	Not employed	<input type="checkbox"/>
Carer for a person under age 16	<input type="checkbox"/>	Carer for a person over age 16	<input type="checkbox"/>	Under 16	<input type="checkbox"/>
In full-time education	<input type="checkbox"/>	Pensioner	<input type="checkbox"/>	Other	<input type="checkbox"/>
If ‘Other’, please specify	<input type="text"/>				

13. If you fall into more than one category, please cross the most appropriate box.

Part 2a – Eligibility

To be eligible for this plan, you must be resident in the UK for tax purposes.

If you are eligible, go to Part 2b. If you are not resident in the UK for tax purposes, you normally cannot apply for this plan.

Part 2a

If you are in any doubt as to whether or not you are ‘resident in the UK’ you should check with HMRC.

Part 2b – Your employer’s other pension schemes

1. Are you a member of your employer’s occupational pension scheme?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. Have you opted out of an occupational pension scheme or are you planning to opt out of an occupational pension scheme in favour of making payments to this plan?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Have you chosen not to join an occupational pension scheme which you are currently eligible to join, or which you will be able to join at the end of a specified waiting period, in favour of making payments to this plan?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

An **occupational pension scheme** is an employer’s pension scheme which promises to provide you with a pension and/or a lump sum on your retirement. It does not include:

- (i) any personal pension scheme, or group personal pension scheme, even if your employer pays into it;
- (ii) any stakeholder pension scheme, or group stakeholder pension scheme, even if your employer pays into it;
- (iii) any scheme which pays benefits only on your death; or
- (iv) any scheme which is not registered with HM Revenue & Customs.

The scheme is not necessarily run directly by your employer. It may be a scheme for employees within a particular trade or industry run by a representative body and to which your employer pays.



You may still be eligible to make a transfer payment from a UK registered pension scheme if:

- (a) you are habitually resident in the UK, or**
- (b) you are transferring from another Standard Life pension plan and you are habitually resident in a European country. Please speak to us or your adviser for more information.**

Part 3 – Details of transfer payments (if any – if none, go straight to Part 4)

You only need to complete this part if you wish to transfer benefits from another pension scheme or policy.

- Standard Life is unable to accept transfers from schemes which were originally set up as Unfunded Unapproved Retirement Benefit Schemes (UURBS). Please call us if this affects you.

Part 3

If you are making more than three transfer payments, you can photocopy page 5 for each additional transfer payment and attach all the additional pages to this form. Please give the scheme reference or policy number for each additional transfer in Part 7f.

Part 3a – Details of the plan(s) from which you are transferring – Transfer payment 1

Transferring scheme name

Contact name

Name and address of the administrator of the transferring scheme

Name

Building number

Street

City/Town

County

Postcode

Telephone number

Your reference number or policy number

1. What's the estimated value of this payment? £

Are you transferring all or some of this pension? All Some

2. Is the above scheme a workplace pension to which you or your employer are contributing? Yes No

3. Is the scheme you are transferring from a registered pension scheme? Yes No

4. Is this payment part of a block transfer? Yes No

The following questions relate to divorce:

5. Is this pension in someone else's name? Yes No

If **yes**, what is that person's:

Full name

Date of birth (DD/MM/YYYY)

6. Is any part of the payment subject to a pension attachment (earmarking) order? Yes No

If **'yes'**, we will need to see a copy of the attachment order before we can accept the payment.

7. Has any part of the payment been awarded to you as part of a divorce settlement (a pension credit)? Yes No

If **'yes'**, please answer questions 8 and 9.

8. If you are transferring from a workplace pension, were you given the opportunity to leave the pension credit in your ex-partner's scheme (known as shadow membership)? Yes No

9. Had your ex-partner taken any retirement benefits from their pension before the divorce? Yes No

If you are transferring a Defined Benefits pension scheme, or have safeguarded benefits and the amount you are transferring is £30,000 or more, you must take financial advice.



2 and 8. Some workplace pensions are known as 'occupational', 'works', 'company' or 'work-based' pensions.

3. A registered pension scheme is a scheme registered under Chapter 2 of Part 4 of the Finance Act 2004. If you are unsure whether your existing scheme is registered, you can check this with your pension provider.

4. A block transfer is an option where at least you and one other member transfer all their benefits from one scheme to another at the same time. Not all members must transfer. Both the ceding scheme and new scheme must be the same for both members. This protects the members' rights to a tax-free lump sum over 25% or an early retirement age. This protection applies to one block transfer only.

Part 3a – Details of the plan(s) from which you are transferring – Transfer payment 2

Transferring scheme name

Contact name

Name and address of the administrator of the transferring scheme

Name

Building number

Street

City/Town

County

Postcode

Telephone number

Your reference number or policy number

1. What's the estimated value of this payment? £

Are you transferring all or some of this pension? All Some

2. Is the above scheme a workplace pension to which you or your employer are contributing? Yes No

3. Is the scheme you are transferring from a registered pension scheme? Yes No

4. Is this payment part of a block transfer? Yes No

The following questions relate to divorce:

5. Is this pension in someone else's name? Yes No

If **yes**, what is that person's:

Full name

Date of birth (DD/MM/YYYY)

6. Is any part of the payment subject to a pension attachment (earmarking) order? Yes No

If **'yes'**, we will need to see a copy of the attachment order before we can accept the payment.

7. Has any part of the payment been awarded to you as part of a divorce settlement (a pension credit)? Yes No

If **'yes'**, please answer questions 8 and 9.

8. If you are transferring from a workplace pension, were you given the opportunity to leave the pension credit in your ex-partner's scheme (known as shadow membership)? Yes No

9. Had your ex-partner taken any retirement benefits from their pension before the divorce? Yes No

If you are transferring a Defined Benefits pension, or have safeguarded benefits scheme and the amount you are transferring is £30,000 or more, you must take financial advice.



2 and 8. Some workplace pensions are known as 'occupational', 'works', 'company' or 'work-based' pensions.

3. A registered pension scheme is a scheme registered under Chapter 2 of Part 4 of the Finance Act 2004. If you are unsure whether your existing scheme is registered, you can check this with your pension provider.

4. A block transfer is an option where at least you and one other member transfer all their benefits from one scheme to another at the same time. Not all members must transfer. Both the ceding scheme and new scheme must be the same for both members. This protects the members' rights to a tax-free lump sum over 25% or an early retirement age. This protection applies to one block transfer only.

Part 3a – Details of the plan(s) from which you are transferring – Transfer payment 3

Transferring scheme name

Contact name

Name and address of the administrator of the transferring scheme

Name

Building number

Street

City/Town

County

Postcode

Telephone number

Your reference number or policy number

1. What's the estimated value of this payment? £

Are you transferring all or some of this pension? All Some

2. Is the above scheme a workplace pension to which you or your employer are contributing? Yes No

3. Is the scheme you are transferring from a registered pension scheme? Yes No

4. Is this payment part of a block transfer? Yes No

The following questions relate to divorce:

5. Is this pension in someone else's name? Yes No

If **yes**, what is that person's:

Full name

Date of birth (DD/MM/YYYY)

6. Is any part of the payment subject to a pension attachment (earmarking) order? Yes No

If **'yes'**, we will need to see a copy of the attachment order before we can accept the payment.

7. Has any part of the payment been awarded to you as part of a divorce settlement (a pension credit)? Yes No

If **'yes'**, please answer questions 8 and 9.

8. If you are transferring from a workplace pension, were you given the opportunity to leave the pension credit in your ex-partner's scheme (known as shadow membership)? Yes No

9. Had your ex-partner taken any retirement benefits from their pension before the divorce? Yes No

If you are transferring a Defined Benefits pension scheme, or have safeguarded benefits and the amount you are transferring is £30,000 or more, you must take financial advice.



2 and 8. Some workplace pensions are known as 'occupational', 'works', 'company' or 'work-based' pensions.

3. A registered pension scheme is a scheme registered under Chapter 2 of Part 4 of the Finance Act 2004. If you are unsure whether your existing scheme is registered, you can check this with your pension provider.

4. A block transfer is an option where at least you and one other member transfer all their benefits from one scheme to another at the same time. Not all members must transfer. Both the ceding scheme and new scheme must be the same for both members. This protects the members' rights to a tax-free lump sum over 25% or an early retirement age. This protection applies to one block transfer only.

Part 4 – Payments – complete if you or your employer are making regular or single payments

- The minimum payment you can make to set up the plan is £150 a month, or £1,500 a year, or a single payment of £1,000. This is reduced to £100 a month and £1,000 a year if there is already at least £25,000 in your plan. (All figures shown are gross.)
- There are limits to how much you can pay into your plan each year set by HM Revenue & Customs. Please refer to 'Information about tax relief, limits and your pension' (GEN658) for more information.
- If you are self-employed, any payments made from the partnership account should be reimbursed, as applicable.
- Regular payments must be made by direct debit. You can stop, restart, increase, decrease or suspend your payment at any time. You will not be charged for this.
- Please complete form SLSIP33 if any payments are to be made by a third party, other than your employer.
- If you 'recycle' a tax-free lump sum you may face a tax charge. Leaflet GEN449, 'Recycling of lump sums', explains what recycling means and what the tax consequences are.
- You and/or your employer shouldn't pay into this plan if you have Enhanced Protection or any type of Fixed Protection in place. Please refer to 'Information about tax relief, limits and your pension' (GEN658) for more information.



If your employer is making payments to your plan you must also enclose a 'Confirmation of Verification of Identity – Corporate and Other Non-Personal Entity' form (AA48A), together with a Direct Debit Mandate from your employer's bank account. Please contact us if you don't have a financial adviser (who can obtain these forms online).

If you access your benefits flexibly, with any pension provider, your annual allowance entitlement is £10,000. Any payment you make, or is made on your behalf over £10,000, will result in a tax charge. Please refer to 'information about tax relief, limits and your pension' (GEN658) for more information.

Gross payment

The amount we take from your bank account for your payments will be less than the gross amount, as we automatically add basic-rate tax relief to your payments.

Salary deduction is where your net payments are deducted from your salary and passed to Standard Life by your employer.

Salary exchange is where you give up part of your normal salary in return for an employer payment to your pension plan.

2. The first payment date must be a date after you have signed the application form.

3. Contribution controls legislation will apply to all payments made by or via your employer. This means that Standard Life must make a report to the Pensions Regulator if payments are not made. Any payments made in respect of one month must be received by the 19th of the following month.

The legal requirements on employers who are subject to contribution controls legislation mean that Direct Debit can only be used as a payment method if we receive payments at the same frequency as you are paid.

Part 4a – Payments to be made to your plan by you and/or your employer

1. Single payments (if any)

	Your payment (direct from you)	Your payment (by salary deduction)	Your employer's payment (inc. salary exchange)
Gross payment (including basic-rate tax relief)	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

You can confirm the method of payment (such as BACS or Faster Payment) in Part 4d.

2. Regular payments (if any)

	Your payment (direct from you)	Your payment (by salary deduction)	Your employer's payment (inc. salary exchange)
Gross payment	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Payment frequency	Monthly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Yearly <input type="checkbox"/>
First payment date Between 1st and 28th (DD/MM/YY)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date first payment to be deducted from salary (DD/MM/YY)	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Complete the following if payments are being made by your employer to your plan.

Employer's name

Name of contact

Telephone (inc. STD)

Company registration no. Please ask your employer if you are not sure what this is.

Employer's address

Building number Street

City/Town

County Postcode

Part 4b – Automatic yearly increases for regular payments

Complete this part if you want your regular payments (including existing ones) to increase automatically each year. If you don't want automatic increases, go straight to Part 4c.

- We will automatically apply the increases on the anniversary of the first payment date, unless you specify otherwise.
- If the date you choose falls within three months of the date we set up your plan, we will not increase your payments until your chosen date the following year.
- If you or your employer choose to have automatic yearly increases, then these increases will apply to **ALL** regular payments.

1. Do you want all your payments to increase:

- by a fixed percentage of your previous year's payments 2% 4% 10%
- or by your choice of percentage (1-10%) .%
- or in line with average weekly earnings

2. When do you want the first automatic increase to be made? (DD/MM/YYYY)

1. If you choose to increase your payments in line with national average earnings and the index stays the same or goes down, your regular payments will stay the same.

Part 4c – Regular payments – Direct Debit Instruction

Completion of your Direct Debit Instruction

1. Complete this form to instruct your Bank/Building Society to make payments directly from your account.

2. If the due date falls on a weekend or Bank Holiday, your account will be debited within two working days.

3. Please ensure that the Instruction is signed and dated and the Direct Debit Guarantee is detached before the Instruction is returned to Standard Life.

Please supply the following details:

Instruction to your Bank or Building Society to pay by Direct Debit

Issued by: Standard Life, Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH

Originator's identification no.

9 9 1 5 2 4

For Standard Life official use only

This is not part of the Instruction to your Bank or Building Society.

Name and full postal address of your Bank or Building Society branch.

	Postcode

Name(s) of Account-holder(s)

Bank or Building Society/Account No. Reference Number

Branch Sort Code Please refer to the top right hand corner of your cheque book.

Your Instruction to the Bank/Building Society, and Signature

Please pay Standard Life Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Standard Life and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s) ▶

▶

Date (DD/MM/YYYY)



Signature(s)

Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

Part 4d – Single payments

You can make payments electronically safely and securely by:

- BACS **payment received within 3 working days**
- Faster Payment **immediate payment received same day within 2 hours**
- CHAPS/Telegraphic Transfer **payment received by close of business same day**

If you want to make an electronic payment you will need to do this through your bank. You will need our bank details to make this transfer.

Our bank details for payments are:

Account Number 42288230
Sort Code 40 03 28

Bank Address
HSBC Bank plc
Holborn Circus Branch
31 Holborn
LONDON
EC1N 2HR

Please let us know the Sort Code and Account Number you are sending your payment from. This is to help us match your money to your plan.

If this is the same as your Direct Debit Instruction please cross

If this is from a different account please tell us:

Bank or Building Society Sort Code

Bank or Building Society Account Number

Name(s) of account holder(s)

You can also pay single payments by cheque, which may take longer to be applied to your plan. Cheques should be made payable to 'Standard Life', and enclosed with this application form.

Your bank may have a limit on Faster Payments. If you want to pay by BACS, Faster Payment, CHAPS/ Telegraphic Transfer, please check that your bank can make this type of payment.



Please use your plan number (if you have one) or your name and date of birth as the reference for your payment. This helps us match the money to your plan.

Part 5 – How you want to pay your adviser

Please tell us what you want to pay from your plan to your financial adviser. We will use the information you provide in this section to pay your financial adviser. By signing the declaration in Part 7 of this form, you are:

- agreeing to the payment of the adviser charges documented below, and
- authorising Standard Life to accept all future instructions from your adviser for payment of adviser charges that you have agreed to pay them from your plan.

You do not need to complete the information in Parts 5a, 5b or 5c if:

- your financial adviser is billing you directly for their services, or
- your financial adviser is not charging you for their services, or
- you do not have a financial adviser.

If any of these three options apply, cross this box and then go to Part 6.

Part 5a – Adviser charge for regular payments

Complete this section if you will be making regular payments to your plan and have agreed a charge for advice with your adviser (either as one payment or spread over a period of time).

We call this a ‘Regular Initial Adviser Charge’.

Spread payment of Regular Initial Adviser Charge (please complete one of the following options)

£ a month for months.

£ a year for years.

£ a quarter for quarters.

£ a half-year for 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 5b – Adviser charge for single and transfer payments

Complete this section if you (and/or your employer) will be making a single payment or transfer payments to your plan and you have agreed a charge for advice with your adviser.

We call this an ‘Initial Adviser Charge’.

Initial Adviser Charges will be deducted as each transfer payment is processed.

Please state the amount of Initial Adviser Charge per payment as either a monetary amount or percentage of that payment.

Single payment from you	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Single payment from your employer	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 1	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 2	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%
Transfer payment 3	£	<input type="text"/>	.	<input type="text"/>	OR	<input type="text"/>	.	<input type="text"/>	%

Part 5c – Ongoing Adviser Charge

Complete this section if you have agreed to pay your adviser for ongoing advice in relation to your plan. The Ongoing Adviser Charge can either be a set amount or a percentage of your plan value.

We call this an ‘Ongoing Adviser Charge’.

1. Set amount

£	<input type="text"/>	.	<input type="text"/>	every month	£	<input type="text"/>	.	<input type="text"/>	every year
£	<input type="text"/>	.	<input type="text"/>	every quarter	£	<input type="text"/>	.	<input type="text"/>	every half-year

OR

2. Percentage of plan value % of your plan value a year

This percentage can be taken once a year or split across a different time period:

Yearly	<input type="checkbox"/>	Monthly	<input type="checkbox"/>
Quarterly	<input type="checkbox"/>	Half-yearly	<input type="checkbox"/>

Part 6 – Where would you like to invest your transfer, single and regular payments?**To invest in** **Complete**

Ready-made option	6a
Other investment options	6b
Trustee Cash Account	6c

Please ensure that the total percentage adds up to 100% or the amounts you enter add up to the total payment. If they do not, ALL the money will be invested in the Trustee Cash Account until you give us clear investment instructions for the whole amount.

If you do not complete Part 6 or if your instructions are unclear, we will pay the transfer, single or regular payments described in this form into the Trustee Cash Account.

Part 6a – Ready-made option

Profile code	Profile name	%
8ESG	Sustainable Multi Asset Universal (10 year) SLP	

This ready-made option is not available if you are accessing money from your plan.

Part 6b – Other investment options

Fund code(s)/ Profile code	Fund name(s)/profile name	Regular payments £ or %	Transfer/ single payments £ or %

No more than 12 pension funds can be selected, 11 if you also want to invest in the Trustee Cash Account.



Please note that the **fund code(s)/profile code** and the **FULL fund name(s)/profile name** must be included on this form, as shown in the example. Fund codes can be found in the AMPP Fund list (AMPP5a).

Please note: if you choose the ready-made option or another Lifestyle profile you cannot invest in any other investment options.

If adding money to an existing plan and selecting a lifestyle profile, all existing funds, with the exception of cash, will be switched into that profile.

Part 6c – Trustee Cash Account - also used to pay charges

	Regular payments £ or %	Transfer/single payments £ or %
How much do you want to invest in the Trustee Cash Account?		

It is important that you put enough money in the Trustee Cash Account to pay any advice charges that you want paid from it.

Trustee Cash Account

There is no additional charge for any money invested in this account. The rate of interest is normally 1% below the Bank of England base rate. You can check the rate by contacting us or your adviser.

Part 7 – Important information and declarations

Please read Parts 7a to 7e before signing the declaration in Part 7f.

If you decide to opt out of receiving information from us, please cross the box in Part 7b.

You can, if you wish, stop your adviser from telling us how to invest your money by crossing the box in Part 7e.

Part 7g should only be completed if a legal guardian needs to sign this application.

Part 7a – Instruction for payment of death benefits

You can complete an ‘Instruction for payment of death benefits’ form (PPP36) to tell us who you would like your death benefits paid out to if you die before buying an annuity.

Part 7b – Data Protection Notice – Important, please read

Data Protection Notice – Using your Personal Information

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>

Part 7c – Money Laundering Regulations

To comply with the Money Laundering Regulations, we are required to verify the identity of our customers. We do this by carrying out an online 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 7d – Declarations – Important, please read**Important information****HM Revenue & Customs warning**

This application will also be used as an application for tax relief at source. If you give false information you may be prosecuted.

Declaration by Phoenix Life Limited

If Phoenix Life Limited, accepts this application, it hereby agrees as administrator and provider in terms of the rules of the Standard Life Self Invested Personal Pension Scheme to administer the Scheme as required by the rules.

Your declaration

1. I, the person named in Part 2 of this application, request that the benefits described in or arising from payments specified in the application be provided for me under the Standard Life Self Invested Personal Pension Scheme, and in consideration of its acceptance I undertake to be bound in all respects by the rules of the Scheme in force from time to time.
2. I declare that to the best of my knowledge and belief, the statements made in this application whether in my handwriting or not, are correct and complete.
3. I agree to be bound by the AMPP Terms and Conditions and the Terms and Conditions for paying adviser charges.
4. I agree to my financial adviser receiving the adviser charge(s) described in Part 5 and authorise Standard Life to accept all future instructions from my adviser to pay the charges that I have agreed with my adviser.
5. I have 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 or services).
6. I authorise Standard Life to accept information provided from the financial adviser named in this form 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 policies.

If you **do not** want to give us this authorisation, cross this box.

If I am applying to make regular or single payments

7. I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004, will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year. (The 'basic amount' for the current tax year is £3,600 gross. This may change in future tax years.)
8. I declare that I will tell Standard Life if an event occurs (such as those listed in my Key Features Document) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the event occurs, or within 30 days of the event if this is later.

If I am applying to make a transfer payment**My declarations to the administrators of the transferring schemes named in Part 3**

9. I authorise and instruct you to transfer funds from the plan(s) as listed in Part 3 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 the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan.
10. I authorise you to release all necessary information to Standard Life to enable the transfer of funds to Standard Life.
11. I authorise you to obtain from and release to the financial adviser named in this application any additional information that may be required to enable the transfer of funds.
12. If an employer is paying contributions to any of the plans as listed in Part 3, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).
13. 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.

By filling in this form, you are applying to enter into a contract with Phoenix Life Limited, trading as Standard Life.

We will provide you with a copy of this form and the terms and conditions of the contract on request.

6. If you do not cross this box we will assume that you have given your adviser your authority.

Part 7d – Declarations – Important, please read (continued)

- 14. Where the payment(s) made to Standard Life represent(s) all of the funds under the plan(s) listed in Part 3, 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.
- 15. Where the payment(s) made to Standard Life represent(s) part of the funds under the plan(s) listed in Part 3, 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

- 16. 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.

Part 7e – Authorising your financial adviser to give investment instructions on your behalf

I authorise Standard Life to accept instructions from the financial adviser named in this form to buy or sell investments under my plan. This authorisation will apply until Standard Life receives a written instruction from me changing or withdrawing my Authorisation.

If you **do not** want to authorise your financial adviser, as outlined above, cross this box:

Part 7e

If you do not complete this section we will assume that you have given your adviser your authority. You must leave the cross box blank if you want your adviser to be able to contact us with investment instructions on your behalf.

Part 7f – Reminders and your signature

Before signing this form, check that you:

- 1. Have enclosed other application forms, if applicable
- 2. Have completed all the appropriate parts
- 3. Have read through all the declarations

It is a serious offence to give false statements. The penalties are severe and could lead to prosecution. You must tell us if any information changes before your plan starts. If you don't or you fail to tell us any other relevant information, it may make your plan void.

If you are making more than three transfers into this plan please show the scheme reference numbers/policy numbers in the table below for the transfers included on any photocopies of Part 3. Declarations 9 - 16 in Part 7d above apply to all transfer payments shown in Part 3 or on photocopies of Part 3 submitted with this application.

Scheme reference number/policy number

Please now sign the form.

Signature 

Date
(DD/MM/YYYY)

If you are signing this form as a legal guardian please ensure you also complete Part 7g.



Signature required.

Part 7g – Declaration – by legal guardian

- I understand that the payments made to this Scheme in respect of the person named in Part 2 will only be returned to them in the form of benefits payable under the rules of the Scheme. In particular I understand that no benefits will be returned to them before age 55 unless the person is incapacitated.
- I also understand that until the person reaches age 16, I am responsible for ensuring that the payment limits set by HM Revenue & Customs are not exceeded.

Title
(Mr/Mrs/Miss/Ms/
Other eg Dr/Rev)

Male Female

Surname

First name(s)
in full

Address

House
number

Street

City/Town

County

Postcode

How long have you
been at this address?

Years

Months

Date of birth
(DD/MM/YYYY)

Telephone

Work

Home

Mobile

National
Insurance
number

Signature



Date
(DD/MM/YYYY)



**Legal Guardian's signature
required (if any).**

Part 7h – Electronic submission declaration

Before signing this section, tick the box to show you:

- 1. Have completed Part 2 – Planholder’s details.
- 2. Have completed Part 3 – Details of the plan(s) from which you are transferring (if applicable).
- 3. Have completed Part 5 – How you want to pay your adviser (if applicable).
- 4. Have completed Part 7f – Reminders and your signature.

If your employer is making payments to your plan you must also enclose the ‘Confirmation of Verification of Identity – Corporate and Other Non-Personal Entity’ form (AA48A), and a Direct Debit Mandate from your employer’s bank account. Your financial adviser can obtain these forms online.

- 1. I authorise my adviser (Adviser name)

to apply online on my behalf for an Active Money Personal Pension from Standard Life.
- 2. I understand that Standard Life will send me a confirmation schedule containing all the information and declarations I have provided to my adviser.
- 3. I understand that it’s my responsibility to check that all the information given in the confirmation schedule is correct, in particular any charges that I have agreed to pay to my adviser. I will contact Standard Life immediately if there are any errors or omissions.

Signature

Date
(DD/MM/YYYY)

Complete this part if your financial adviser intends to submit your application online. Where this involves a pension transfer and/or a payment to your financial adviser, this form must be returned to Standard Life.

Where Part 7h applies, you can sign an authorisation form as an alternative to completing this application form. Speak to your financial adviser for further information.



Signature required.

Standard Life use only	
Account Manager	<input type="text"/>
Sales Team Code	<input type="text"/>
Consultant Code	<input type="text"/>

AMPP Customer Centre
 Standard Life, Standard Life House,
 30 Lothian Road
 Edinburgh EH1 2DH

www.standardlife.co.uk

Phoenix Life Limited, trading as Standard Life, is the provider and scheme administrator of the Standard Life Self Invested Personal Pension Scheme, and Standard Life Trustee Company Limited is the trustee.

Phoenix Life Limited is registered in England and Wales (1016269) at 1 Wythall Green Way, Wythall, Birmingham, B47 6WG. Phoenix Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Standard Life Trustee Company Limited (SC076046) is registered in Scotland at Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH.

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December 2023



The Direct Debit Guarantee
<ul style="list-style-type: none"> • This Guarantee is offered by all banks and building societies that accept instruction to pay Direct Debits. • If there are any changes to the amount, date or frequency of your Direct Debit, Standard Life will notify you three working days in advance of your account being debited or as otherwise agreed. If you request Standard Life to collect a payment, confirmation of the amount and date will be given to you at the time of the request. • If an error is made in the payment of your Direct Debit, by Standard Life or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society. <ul style="list-style-type: none"> – If you receive a refund you are not entitled to, you must pay it back when Standard Life asks you to. • You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



Important, please tear off and keep safely.