

Who this form is for

This form is for anyone who wishes to make payments to the Retirement Account Plan their 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'.

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.

Once completed please send to:

Standard Life House
30 Lothian Road
Edinburgh
EH1 2DH

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.

RAP31 0319



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 (include area dialling code)			
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"/>
		Divorced <input type="checkbox"/>	Widowed <input type="checkbox"/>

Part 2 – Details of payments

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

Regular payments

First payment date (DD/MM/YYYY)

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If you are joining a scheme which commenced before 1 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.

										%	£										
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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.

										£
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Single lump sum payment

You can make a single lump sum payment at any time. The minimum single payment is £1,000 (unless you are already paying regular payments, or have made a single payment in which case the minimum is £500). Please note that a single lump sum 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 you wish to make.

By you	£																			By your employer	£																		
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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 will pay a flat amount or a percentage of your earnings.

Part 3 – 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 carried out 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 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 have started to take your benefits, the fund that has been built up will be paid in accordance with the rules of the scheme. However, you may wish to arrange additional life cover payable if you die in service.

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. £

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You may only complete this part if you are making regular payments. If you are joining a scheme on which we reduced the number of 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 6 – Data Protection Notice and Communication Preferences – Important, please read

Data Protection Notice – Using your Personal Information

We will collect and use personal information about you and any other named individual on your application such as your name, date of birth and national insurance number in order to provide this product or service and manage our relationship with you. It may be necessary as part of this product or service to collect and use personal information which is defined as ‘special category data’ by data protection law e.g. Health related. Any such special category data will only be collected and used where it’s needed to provide the product or service you have requested or to comply with our legal and regulatory obligations and where we have obtained your explicit consent to process such information.

To provide this product or service and meet our legal and regulatory obligations, we will keep your personal information and copies of records we create (e.g. calls with us) while you are a customer of ours. If this application does not proceed or when you no longer have a relationship with us, we are required to keep information for different legal and regulatory reasons. The length of time will vary and we regularly review our retention periods to make sure they comply with all laws and regulations.

The information collected may be shared with other parts of Standard Life Assurance Limited, Standard Life Aberdeen plc, Phoenix Holding Group (PHG) and other companies we work with to support us in the provision of the product or service you have with us. We may also share your information with our regulators, HM Revenue & Customs and your adviser / employer (for applicable products and services) where necessary and lawful to do so. Whenever we share your personal information, we will do so in line with our obligations to keep your information safe and secure.

The majority of your information is processed in the UK. However, some of your information may be processed by us or the third parties we work with in the European Economic Area (EEA) and countries such as the United States and India. Where your information is being processed outside of the UK we take additional steps to ensure that your information is protected to at least an equivalent level as would be applied by UK data privacy laws e.g. we will put in place legal agreements with our third party suppliers and do regular checks to ensure they meet these obligations.

For more information on how Standard Life processes your personal information and what your rights are, please read our Privacy Policy at <https://www.standardlife.com/sl/privacy-policy.page> or write to the Data Protection Officer, The Phoenix Group, 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

Communication Preferences

Your essential updates

We’ll share important information on your plan and your choices, products and services, plus financial tips from our experts.

We also want to help you plan for the future by keeping you updated on:

Latest news and offers from Standard Life No Yes

Offers of interest from our preferred partners No Yes

To understand how, where and why we use your information, read our Privacy Policy <https://www.standardlife.com/sl/privacy-policy.page>

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



Date

(DD/MM/YYYY)



Signature required.

Part 8 – Trustees’ signature

For and on behalf of Trustees

Date

(DD/MM/YYYY)

Name of Employer

Standard Life Assurance Limited is owned by the Phoenix Group and uses the Standard Life brand under licence from the Standard Life Aberdeen Group. You can find more information about Standard Life Aberdeen plc's strategic partnership with Phoenix at www.standardlife.com/partnership

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

Standard Life Assurance Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. www.standardlife.co.uk

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