For use by qualified financial advisers only.

Bonds Online New Business

STANDARD LIFE

Hello.

This guide will take you through Standard Life's online new business application for Bonds. You can complete a quotation on **adviser**zone, by using the main portals or by requesting one over the telephone. You can then apply online using **adviser**zone.

Standard Life's Bonds online new business application has been designed by working closely with advisers who have helped ensure it is easy to use.

The plans available are:
- Capital Investment Bond
- Distribution Bond

Eligibility Criteria

- There are no more than two lives assured or bond owners
- The applicants live in the United Kingdom, Channel Islands or Isle of Man
- Payment will be made by cheque or banker's draft only
- The application is not for additional investments
- The application is not to be written under trust
- The bond owner is not a business or a company

Why use our online application?

Accuracy

- All information validated online ensuring no delays due to missing or incorrect information saving phone calls between yourself and Standard Life to gather missing information.
- Data submitted populates our processing systems, reducing scope for human error.

Control

- The confirmation schedule is available to view and print for up to 28 days after the case is submitted. This can be saved or printed for your compliance purposes.
- You can track the progress of the case using our New Business Tracking Service on Client View or Pipeline Tracking allowing you to keep your client up to date.
- Our online service is available from 0700 – 2300 weekdays and 0800 – 2000 weekends allowing you more flexibility to submit business when you want to.
- Choice of how you want to capture the customer's signature (data capture form, application form or printed declaration.

Efficiency

- Your quotation details will be pre-populated into the new business application saving you time re-keying the client's data.
- The New Business Application only presents the questions relevant to your application simplifying the way you complete the client's application.
- A policy number is instantly allocated helping you track the progress of your case online or store in your client relationship management system.
- Online Money Laundering checks within the application save you sending additional paperwork.
- Submission Letter ready to print complete with policy number for you to send in with the payment saving you having to write a letter.

1. Retrieve quote on www.adviserzone.com and select 'apply online'
2. Enter client's policy details (policy number will be allocated immediately)
3. Select documentation address and submit application
4. View/print confirmation schedule (available for 28 days)
5. Send in cheque and signed declaration
6. Policy documents are issued as soon as the cheque has been received

How to use the application

Follow these simple steps and you can quickly submit a new application online.

Quotes can be retrieved from the ***adviser****zone. This includes quotes requested on* ***adviser****zone, portals or over the telephone*

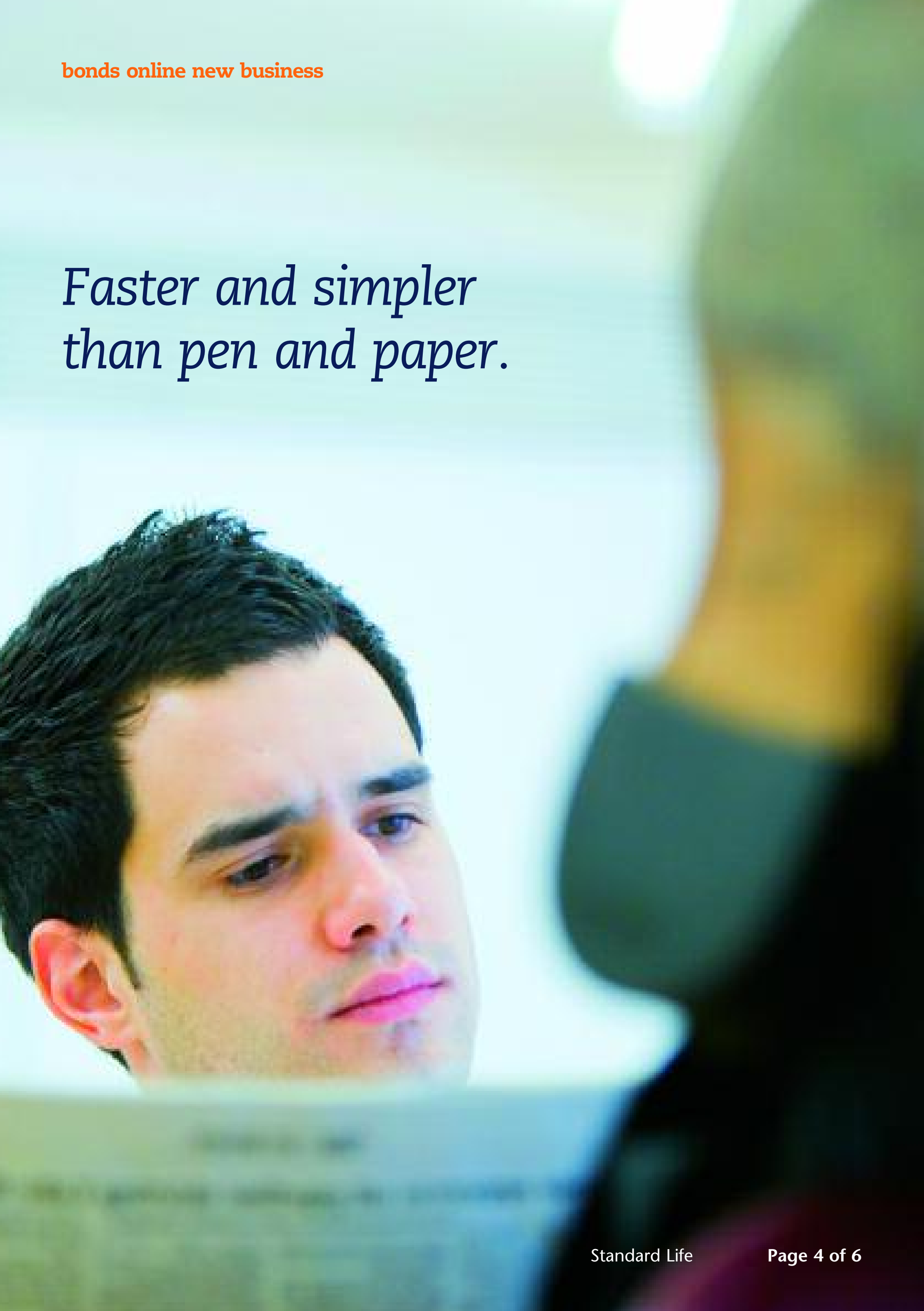
You can choose how you want to capture the client's data ie. Printed application form, data capture form or data from customer file

A client identification check will be completed.

Postcode search is available to save you keying in full address

The confirmation schedule is automatically sent to the client, however a copy is available to you if required

Faster and simpler than pen and paper.



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www.adviserzone.com

adviserzone help desk

Help desk opening hours: Mon – Fri: 8.00am – 5.30pm. Call charges may vary.

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