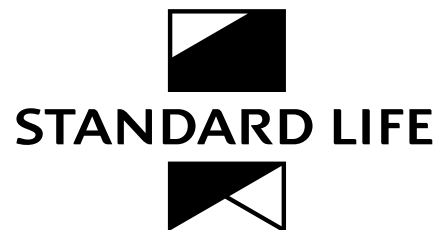


# Small Self-Administered Scheme (SSAS)

## Application for increased benefits



### SAS31 RPG

#### Who this form is for

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.

Where 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 department, Standard Life Assurance Limited, 1 Conference Square, Edinburgh, EH3 8RA.

#### Filling in this form

Before completing this form, please ensure you read the appropriate guide (SAS10RPG) and Key Features Document (SAS17RPG).

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 Standard Life Investments (Mutual Funds) Ltd for the OEIC. If we do not receive separate payment, 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)	Surname		
First names (in full)	Scheme reference number		
Scheme name			
Full name of your employer			
Occupation			
What is your Gross Annual Income – please indicate which income band applies to you.			
Under £10,000 <input type="checkbox"/>	£10,000 to £14,999 <input type="checkbox"/>	£15,000 to £19,999 <input type="checkbox"/>	£20,000 to £24,999 <input type="checkbox"/>
£25,000 to £29,999 <input type="checkbox"/>	£30,000 to £39,999 <input type="checkbox"/>	£40,000 to £49,999 <input type="checkbox"/>	£50,000 or more <input type="checkbox"/>

## Part 2a Regular payment details

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.

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
- Standard Life Investment Company
- Other non-insured investment

Payments are to be **increased** by:

Employer Ordinary  pm/py      Employee Ordinary  pm/py      Employee Voluntary  pm/py

Start date for the increased payment

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.

## Part 2b Single payment details

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.

**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
- Standard Life 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 Standard Life Investments (Mutual Funds) Ltd.

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

Single payment  Employer       Employee

## Part 2c Source of Wealth

**Due to FSA 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"/>             |  |

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

A dependant will be a close relative or some other person who is financially dependent on you.

Complete this part if a pension is to be payable on death in service.

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

Surname

First names (in full)

Date of birth D/M/Y

Relationship to you

Sex

Male

Female

### Part 5 Money Laundering Notice

To comply with Money Laundering Regulations 2007, we may verify your identity by carrying out an on-line check with a reference agency. Where an on-line check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties. 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 - important, please read

All parties named on this form have a right to know that Standard Life holds personal data about them and what purposes it will be used for. Please give them an opportunity to read this notice.

Personal information provided in connection with your application will be used by Standard Life to process your application and apply increased payments to your plan.

If your application does not proceed it will be held on our records for 6 years before it is deleted.

We will keep the information you have supplied confidential, and will not disclose it unless it is lawful to do so.

If you have appointed a financial adviser, we will give them information about the plan and, where appropriate, send copies of correspondence to them to enable them to give you advice.

If you are an employee and your employer is making payments to your plan, we may disclose information to them about the payments they have made.

We and the other members of Standard Life plc would like to contact you from time to time to keep you up to date with special offers, new products and services, newsletters and other promotions. We will never pass your details to companies that are not subsidiaries of Standard Life plc for marketing purposes.

If you do not want to be kept informed, please tick this box.

If you would like to request a copy of the personal data we hold about you, please write to the Data Protection Co-ordinator at our Head Office. We may charge a fee for providing the information.

## 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 read and understood the Data Protection Notice. I agree that my personal information (including sensitive 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 D/M/Y

## For completion by your financial adviser or Standard Life

### *Financial adviser's details*

Intermediary Case Reference Number (maximum of 25 characters)	
Name of Contact	
Location	
Basis of Sale	Whole of Market <input type="checkbox"/> Other <input type="checkbox"/> If other please specify: _____
Was advice given?	Advice <input type="checkbox"/> No advice (eg Execution only) <input type="checkbox"/>
FSA or Authorisation number	
Agency Code	