

This document is intended for
use by financial advisers only.



SIPP for Investment

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**Cash
Solutions**

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**SLIP and
FundZone**

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**Execution
Only Share
dealing**

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**Why SIPP for
investment**

Standard Life Assurance Limited*, registered in Scotland (SC286833), Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH is the Provider and Scheme Administrator of the Standard Life Self Invested Personal Pension Scheme. Standard Life Trustee Company Limited, registered in Scotland (SC076046), also Standard Life House, is the Trustee. Telephone (0131) 225 2552. *Calls may be recorded/monitored.* www.standardlife.co.uk

*Authorised and regulated by the Financial Services Authority

Reasons Why SIPP for Investments – Execution Only Share Dealing

- Execution only share purchase service provided by Stocktrade.
- Quick, simple and secure processes.
- Purchases and sales can be made by a nominated individual – either the client or adviser.
- Secure user ID and password allocated at account set up.
- Quick and easy online dealing for UK share purchase.
- Telephone dealing for UK and Non UK shares also available.
- Real time or streaming real time access to online valuations.
- Once the deal has been placed we pay the money direct to Stocktrade from the Standard Life SIPP bank account with no further involvement for the client.
- Move existing share portfolios into SIPP by selling the shares and use the proceeds to make a payment to the SIPP (tax relief of up to 40% will be payable on the amount paid. The amount of tax relief will depend on the individual's circumstances). The client can then buy the shares back using the Stocktrade online service. (Please note some less recognised stock exchanges may not be available for online trading.)

Tax and legislation are liable to change. The information here is based on Standard Life's current understanding of law and HM Revenue & Customs practice. The value of tax relief and other tax rules may also change and will depend on your client's financial circumstances.