



Who this form is for

When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

This form is for employers who wish to make payments to their employee's pension plan. It can be used for the following Standard Life pension plans:

- Personal Pension Flex (PPFlex)
- Personal Pension One (PPOne)
- Personal Pension Plan (PPP)
- Stakeholder Pension Plan (SPP)

Filling in this form

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.

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 Employer details

Full name of employer

Address

Postcode

Telephone number (inc. STD code)

Nature of business

Please read Part 7 which explains the identity checks that we need to carry out.

Tick type of business

Partnership Limited Liability Partnership (LLP) Sole Trader UK Private Limited Company (LTD)

UK Public Limited Company (PLC) Charity Other

Part 2 Contact details

Please supply details of the person Standard Life should contact about your payments.

Name of pension plan administrator

Telephone number (inc. STD code)

E-mail address

Name of person responsible for payroll and submission of payments (if different from above)

Telephone number (inc. STD code) (if different from above)

E-mail address (if different from above)

Part 3 Planholder details

Please provide details of the pension plan you wish to make payments to.

Pension plan number

Planholder's details:

Surname

First names (in full)

Date of birth D/M/Y

National Insurance number

Part 4 Employer payments

I, the employer of the applicant named in Part 3 of this application form, wish to make payments to their Personal or Stakeholder Pension Plan.

Please state the GROSS amount you wish to pay (minimum £20 for SPP, £40 for all other contracts where no regular payments are currently being made, or £10 when regular payments are being made).

£

How often do you want to pay the amount?

Monthly

Yearly

(PPFlex and SPP only) Other

If other, please specify.

Part 5 Payroll deduction

Will the employee payment now be collected by payroll deduction?

Yes No

If 'No', employee payments will be paid by the individual, for example by direct debit from their own bank account. Your employee will already have provided their payment instruction on their application form. Please go to Part 6.

If 'Yes', you must deduct the employee's NET payments from their NET pay. Please complete the following questions.

Payments to be deducted from employee's salary on each payday.

£

Employer payment on each payday.

£

What is your company's payroll date?

eg 28th of month or every Friday

On what date will the first payment be deducted from payroll?

D/M/Y

Contribution controls legislation applies to all employer payments, and all employee payments paid by payroll deduction. This means that Standard Life must report to the Pensions Regulator all instances where payments are not received by the regulator's due date. To avoid being reported, your payment must arrive at Standard Life by the Pensions Regulator due date shown on this record. The Pensions Regulator due date for the first and subsequent payments is as follows:

If there are any payments deducted from the employee's salary:

19th of the month following the month they were deducted from salary

(note this applies to any employer payments being made along with the employee payments).

If there are only payments being made by the employer:

19th of the month following the month in which the payment is due to be made.

Note

Examples of possible entries are

If there are any payments deducted from salary:

- 16 January 2008 and each 16th of the month thereafter (if employees are paid on the 16th of each month)
- 22 February 2008 and every Friday thereafter (if employees are paid every Friday)

Part 6 Payment details

Payroll deduction and Direct Debit

This means that you deduct any employee payments from their pay and send them, and any payments you are making, to Standard Life by Direct Debit.

If employee payments are deducted from salary, Direct Debit is only a suitable payment method if:

- employee payments are paid to us at the same frequency as employees are paid.
- any employer payments are paid at the same frequency as employee payments.

The bank details provided here should be for the employer's account.

Please choose a payment method from the options below. If you are unsure which option is the most suitable for you, your financial adviser can help you decide.

1) Direct Debit

This is typically the most convenient way to make payments. To pay by Direct Debit please complete the Direct Debit instruction below:

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

Completion of your Direct Debit Instruction

1. Complete this part 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.

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

9 9 1 5 2 4

The Manager

Postcode

Name(s) of Account-holder(s)

Bank or Building Society Account Number

Branch Sort Code

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

Reference Number

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

Date D/M/Y

_____|_____|_____

FOR STANDARD LIFE OFFICIAL USE ONLY
 This is not part of the Instruction to your Bank or Building Society.

The Direct Debit guarantee is attached at the back of this form. Please tear it off and keep it safely.

2) Other

Other payment methods may be available on request. Please speak to your adviser for more information.

Part 7 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.

PARTNERSHIPS

If you are a member of a professional body please give us their details (eg The Law Society, Corgi, etc) and, if applicable, your registered number.

If you are not a member of a professional body we will need to identify each partner who is an authorised signatory. To enable us to do this please arrange for each person to contact us.

SOLE TRADER

We are required to identify the owner of the business as an individual. To allow us to do this please arrange for the owner to contact us. We will also require an original or certified copy of one of the following:

- Business bank account statement
- Accountants reference

LLP/LTD/PLC

Please provide us with the full company name, registered address and registered number or alternatively the certificate of incorporation.

CHARITY

Please provide the charity number and a contact name.

OTHER

Please contact us to discuss the requirements for identity checks.

HOW TO CONTACT US

Please call us on 0845 60 60 012 (call charges may vary) or, alternatively, please provide us with a contact number and convenient time to make contact to allow us to complete our verification.

Part 8 Data Protection Notice – Important, please read

Any personal information provided in this form will only be used to make payments to your employee's pension plan. We will keep the information which you have supplied confidential and will not disclose it unless it is lawful to do so.

Part 9 Declaration

A copy of your completed application form will be made available on request.

I confirm that the information provided in this form is true and correct.

Signature

Date D/M/Y

For and on behalf of employer.

If you have any problems regarding the completion of this form, please contact your adviser.

Financial adviser's details

Intermediary Reference Number (maximum 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 <input type="checkbox"/> (eg, Execution only)
Commission Basis	Note: If this box is left blank, commission will be paid on the basis agreed for this scheme. Type of commission % of entitlement Regular Premium Initial Commission (RPIC) <input type="text"/> % Fund Based Commission (FBC) <input type="text"/> % Level <input type="text"/> %
Money laundering	Money laundering form completed and attached <input type="checkbox"/>
FSA or Authorisation number	

Standard Life Assurance Limited, registered in Scotland (SC286833), Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH, authorised and regulated by the Financial Services Authority. 0131 225 2552. *Calls may be recorded/monitored.* www.standardlife.co.uk

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The Direct Debit Guarantee

Important, please tear off and keep safely.

- This guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.
- If the amounts to be paid or the payment dates change Standard Life will notify you 5 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Standard Life or your Bank/Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time, by writing to your Bank or Building Society. Please also send a copy of your letter to us.