

SPPF30a

### Who this form is for

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

This form is for a third party who wishes to make payments into a pension plan. It can be used for the following Standard Life pension plans:

- Personal Pension Flex
- Stakeholder Pension Plan

### Filling in this form

Before completing this form please read the appropriate key features document.

This form is to gather information if an additional third party wishes to make payments to your Pension Plan. You can ask for a copy of the completed form, and the terms and conditions of the contract.

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 Planholder's personal details

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	Surname
First names (in full)	
Date of birth	D/M/Y
National Insurance Number (if applicable)	
Plan number (if existing plan)	

### Part 2 Third party payments

This section should be completed if an additional third party (such as a spouse, civil partner, parent or grandparent) wishes to make payments to your Pension Plan.

The minimum payment that can be made is:

Personal Pension Flex £40 gross each month or £400 each year. Stakeholder £20 gross.

If a planholder 'recycles' a tax-free lump sum, they may face a tax charge. Leaflet GEN449 explains what recycling is and what the tax consequences are. Payments made by a third party can count as recycling.

**THE DETAILS BELOW MUST BE COMPLETED AND SIGNED BY THE THIRD PARTY:**

Male <input type="checkbox"/>	Female <input type="checkbox"/>
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	
Surname	
First names (in full)	
Current address	
Postcode	
How long have you been at this address?	



### Part 3 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 4 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.

The personal information provided in connection with your application will be used by Standard Life to set up and administer the 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 the planholder has appointed a financial adviser, we will give him information about the plan and, where appropriate, send copies of correspondence to him to enable him to give the planholder advice. If the planholder's employer is making payments to the plan, we may disclose information to them about the payments they have made.

We and the other subsidiaries 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 5 Declaration

I have read and understood the Data Protection Notice. I agree that my personal 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).

I confirm that the information given in this application form, whether in my handwriting or not, is true and correct.

Third party Signature

Date D/M/Y

Relationship to planholder

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](http://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.