

# (Group) Additional Voluntary Contributions

**Application form** 

## Who this form is for

This form is for anyone who wishes to make payments to the (Group) Additional Voluntary Contributions Plan arranged with Standard Life by their employer. When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

## **GAVC30 0921**

If you have any problems filling in this Application, please speak to your financial adviser or Standard Life.

# 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.

Before completing this form, please complete all sections correctly, initialling any changes you make. Please ensure that you read Part 5 – Data Protection Notice and Communication Preferences – and read and sign Part 6 – Member's declaration. Please note that failure to give correct answers could invalidate your application.

A copy of the standard terms and conditions relating to the contract and a copy of your completed application form will be sent to you on request.

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)		Sex	Male	Female
Surname				
Forenames (in full)				
National Insurance Number				
Date of birth (DD/MM/YYYY)		Normal Retire date (DD/MM/		
Address				
House number	Street			
City/Town				
County				
Postcode				

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(Group) Additional Voluntary Contributions
Part 1 – Your personal details <i>(continued)</i>
Telephone number (inc STD code)
Home
Business
Marital status Single Married/civil Separated Divorced Widowed
Department
Employee Reference Number
Part 2 – Payment details
You can make payments to increase your retirement benefits. Please note that all payments must be made through your employer/the scheme trustees.
Regular payments First payment date (DD/MM/YYYY)
If the plan you are joining started after 25 <sup>th</sup> February 2002 your regular payments must be expressed as a flat amount. If you are joining a plan that started on or before 14 <sup>th</sup> January 2002 you may have to express your payments as a percentage of your earnings.
Your payments £ OR %
Monthly or Weekly or 4 Weekly
If your payments are going to be made as a percentage of your earnings, please give the earnings or expected earnings on which the first year's payments are to be based. Your employer will be able to provide you with this information.
Single lump-sum payment
You can make a single lump-sum payment at any time. The minimum single payment is $\pm 1,000$ (unless you are already making regular payments, or have already made a single payment, in which case the minimum is $\pm 500$ ).
Please indicate the amount of single payment you wish to make. <b>£</b>
To comply with the Money Laundering Regulations, we are required to verify the identity of our customers. We do this by carrying out an online identity check with a reference agency. This is not a credit check and will not affect your credit rating. The agency will verify your identity against public records and confirm whether you have a credit history (but will not disclose any information to us about your actual borrowings). The agency will add a note to your credit file to show that an identity check was requested by Standard Life. If successful, a copy of the results will be held by Standard Life to evidence that your identity has been verified. We regret that we cannot offer an alternative unless the online check does not confirm your identity, in which case we will carry out a manual check.

Your employer/financial adviser will advise you of the basis for making regular payments to the plan i.e. whether you will pay a flat amount or a percentage of your earnings.

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## Part 3 - Protecting your family

Please complete this section if you want to arrange additional life cover and/or a dependant's pension. If not – go to Part 4.

You may only complete this part if you are making regular payments.

If you die before you have started to take your benefits, the fund that has been built up will be paid in accordance with the rules of the plan. However, you may wish to arrange additional life cover payable if you die in service.

#### **Additional Life Cover**

This will provide your dependants with a specified lump sum in addition to the value of your pension fund. If you would like to arrange additional life cover, please indicate the amount of cover you require.

£					
				•	

#### **Dependant's Pension**

This will provide your dependant(s) with a pension if you die in service. If you require this, please complete the following section.

Sex of Dependant (Male/Female)	Date of birth (DD/MM/YY)	Relationship to you (e.g. spouse/child/parent/other)	Pension amount £ pa

each month (Pay-As-You-Go basis). If you are joining a plan which commenced after 25th February 2002, any life cover payment will be made monthly. This is included within the payments which are made into your plan each month and will be shown in your personal illustration.

If you are joining a plan

life cover will be paid by

which started on or before 25th February 2002, any

cancelling units in your fund

Life cover must cease if you remain in service with your employer after your Normal Retirement Date or if regular payments cease.

#### **Health Questionnaire**

If you have completed this part, you must complete a supplementary **Health Questionnaire**, which will then form part of this Application.

Ask your financial adviser to provide you with a Health Questionnaire if you do not already have one.

Your employer/financial adviser will advise you whether the option of choosing your funds is available to you.



#### **Important:**

Please not that you must include the fund/profile code(s) and the FULL fund/profile name(s) on this form for us to process your appliation. If we don't have this information, we may have to return your Application. Please see the guide 'How to choose the right investment options for your pension' for details of the investment options available to you.

You can switch your payments in and out of various funds to change the mix of investments. We may delay switching in some circumstances. You can only invest in 12 of our funds at any one time. The maximum number of different funds you can invest in during the term of your plan is 20.

# Part 4 - Your investment choice

Please choose your investment option(s) from the guide 'How to choose the right Investment options for your pension' and complete the details in the boxes below. You can invest in more than one fund, but you must make sure that the total percentage adds up to 100%. If you choose a lifestyle profile, you can only combine with the with profits fund which is available through your plan. You can't choose more than one lifestyle profile, and you can't combine a lifestyle profile with any other funds. Please see the guide 'How to choose the right investment options for your pension' (GPEN4 for retail plans or GPEN5 for corporate plans) for details on the with profits fund which is available through your plan.

Fund/Profile code	Fund/Profile name (in full)	%
	Please ensure the total percentage adds up to 100%	100 %

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Signature required.

#### Part 5 - Data Protection Notice

Part 6 - Member's declaration

**Employer** 

We're committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers' personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information. You can get a copy of our Privacy Policy on our website: https://www.standardlife.com/sl/privacy-policy/slal.page

I have had the opportunity to read the Data Protection Notice. I agree that my personal information (including special category 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).

of Member	•			Date (DD/MM/YYYY)	
Part 7 – Tru	ıstees	' signature			
For and on behalf of Trustees	•			Date (DD/MM/YYYY)	
Name of					