

(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'.

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 – Member's Data Protection Notice – 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			
Cityw/Town				
County				
Postcode				

GAVC30 0918

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

Part 1 – Your personal details <i>(continued)</i>					
Telephone number ((inc STD code	2)			
Home					
Business					
Marital status S	Single 🗌	Married/civil Dartnership	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

Your pa

First payment	
date (DD/MM/YYYY)	

If the plan you are joining started after 25th February 2002 your regular payments must be expressed as a flat amount. If you are joining a plan that started on or before 14th January 2002 you may have to express your payments as a percentage of your earnings.

£

£

yments	£		• OR		•	%	
	Monthly	or	Weekly	or	4 Wee	ekly 🗌]

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 ± 500).

Please indicate the amount of single payment you wish to make.

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.

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
	1	1	1

Health Questionnaire

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

Part 4 – Your investment choice

Please choose your fund(s) from the guide 'How to choose the right Investment options for your pension' and complete the details in the boxes below. You can choose to invest in more than 1 fund, but you must ensure that the total percentage adds up to 100%.

Please note that if you choose a Lifestyle profile and wish to combine this with another investment fund, you can only combine this with the pension with profits fund applicable to your plan. Please refer to the booklet '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 applicable to your plan. It is not possible to select more than one Lifestyle profile at a time.

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

If you are joining a plan which started on or before 25th February 2002, any life cover will be paid by cancelling units in your fund 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.

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

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 note that the **fund code(s)** and the FULL **fund name(s)** must be included on this form in order for us to process your Application. If we do not have this information we may have to return your Application. Please refer to the booklet 'How to choose the right investment options for your pension ' for details of the funds 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.

Data Protection Notice - Using your Personal Information

We will collect and use personal information about you and any other named individual on your application such as your name, date of birth and national insurance number in order to provide this product or service and manage our relationship with you. It may be necessary as part of this product or service to collect and use personal information which is defined as 'special category data' by data protection law e.g. Health related. Any such special category data will only be collected and used where it's needed to provide the product or service you have requested or to comply with our legal and regulatory obligations and where we have obtained your explicit consent to process such information.

To provide this product or service and meet our legal and regulatory obligations, we will keep your personal information and copies of records we create (e.g. calls with us) while you are a customer of ours. If this application does not proceed or when you no longer have a relationship with us, we are required to keep information for different legal and regulatory reasons. The length of time will vary and we regularly review our retention periods to make sure they comply with all laws and regulations.

The information collected may be shared with other parts of Standard Life Assurance Limited, Standard Life Aberdeen plc, Phoenix Holding Group (PHG) and other companies we work with to support us in the provision of the product or service you have with us. We may also share your information with our regulators, HM Revenue & Customs and your adviser / employer (for applicable products and services) where necessary and lawful to do so. Whenever we share your personal information, we will do so in line with our obligations to keep your information safe and secure.

The majority of your information is processed in the UK and European Economic Area (EEA). However, some of your information may be processed by us or the third parties we work with outside of the EEA, including countries such as the United States and India. Where your information is being processed outside of the EEA, we take additional steps to ensure that your information is protected to at least an equivalent level as would be applied by UK / EEA data privacy laws e.g. we will put in place legal agreements with our third party suppliers and do regular checks to ensure they meet these obligations.

For more information on how Standard Life processes your personal information and what your rights are, please read our Privacy Policy at www.standardlife.com/privacy or write to the Data Protection Officer at Standard Life Assurance Limited, 30 Lothian Road, Edinburgh, EH1 2DH

Communication Preferences

Your essential updates We'll share important information on your plan and your choices, products and services, plus financial tips from our experts. We also want to help you plan for the future by keeping you updated on: Latest news and offers from Standard Life Aberdeen PLC No Yes For information about Standard Life Aberdeen companies visit StandardLifeAberdeen.com. Offers of interest from our preferred partners No Yes To understand how, where and why we use your information, read our Privacy Policy https://www.standardlife.com/sl/privacy-policy.page

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Part 6 – Me	mber's declaration		
(including sp	nd understood the Data Protection Notice. I agr ecial category data) may be used for the purpos to be contacted with details of other products a	ses described (subject to me exercising	
Signature of Member		Date (DD/MM/YYYY)	Signature required.
Part 7 – Tru	istees' signature		
For and on behalf of Trustees	•	Date (DD/MM/YYYY)	
Name of Employer			

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