

SIPP Application Form for Single Payments to an Existing Plan FSIPP31

Please complete in BLOCK CAPITALS using BLACK INK.

PLEASE NOTE: Any applications received that are not completed correctly
 may incur delays or may have to be returned to you.

Form Code

90651

Source Code

The FundsNetwork™ platform is a service provided by Financial Administration Services Limited (referred to herein as "FundsNetwork"), which is a Fidelity International Group company. When we refer to "Standard Life" we mean "Standard Life Assurance Limited". The FundsNetwork SIPP provided by Standard Life is available exclusively to individual investors, through FundsNetwork. It is not available direct from Standard Life.

WHO THIS FORM IS FOR

You should only use this form if you already have a FundsNetwork Self Invested Personal Pension provided by Standard Life (the "SIPP"). You should also be resident in the UK for tax purposes. Both you and your Intermediary are required to complete this form. You should remember that the Intermediary is acting on your behalf not only by giving you advice, but also regarding the completion of this form.

FILLING IN THIS FORM

Please use BLOCK CAPITALS to fill in this form and any additional instructions you give us. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.

By filling in this form you are applying to enter into a contract with Standard Life. This application will be the basis of the contract if Standard Life accepts your application. Standard Life will provide you with a copy of this form and the terms and conditions of the contract on request.

Until your application has been accepted by Standard Life, their liability is limited to a return of the payments you have made. If your Intermediary or the individual(s) you wish to receive death benefits has changed please notify us in writing.

It is a serious offence to give false statements. The penalties are severe and could lead to prosecution. You must tell us all 'material' facts. These are facts that affect whether or not we can accept your application. You must tell us if any information changes before we accept your payments. If you don't, or you fail to tell us any other relevant information, it may make your plan void.

In this form "we" "our" and "us" refer to Standard Life.

1. Planholder's Details

1 Planholder's Details

The information supplied will be held in the strictest confidence and is subject to the provisions of Data Protection legislation.

Title (Mr/Mrs/Miss/Ms/Other e.g. Dr/Rev)

Surname

B

First Name(s) in Full

Planholder's Permanent Residential Address ("Care Of" and PO Box not acceptable.)
 House Name and/or Number and Street, City, County and Country Details

Home Telephone Number

Daytime Telephone Number (in case of query)

National Insurance Number (Will be 9 characters: 2 letters, 6 numbers followed by the letter A, B, C, or D.)

Postcode

 -

Date of Birth

 / /

Marital Status (please mark an X in the relevant box)

Married/ Civil Partnership	Single	Separated	Divorced/ Dissolved Civil Partnership	Widowed/ Surviving Civil Partner
<input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>	OR <input type="checkbox"/>

A civil partnership is a legal contract between two partners of the same sex.

Fidelity Account or Client Number (if known)

Please send your completed form to your Intermediary or to: Fidelity
 International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.



Occupation

Employment Status (please mark an X in the relevant box)

Employed <input type="checkbox"/>	Self-Employed <input type="checkbox"/>	Not Employed <input type="checkbox"/>	Full Time Education <input type="checkbox"/>	Pensioner <input type="checkbox"/>	Carer for a person under age 16 <input type="checkbox"/>	Carer for a person over age 16 <input type="checkbox"/>	Under 16 <input type="checkbox"/>	Other <input type="checkbox"/>
or	or	or	or	or	or	or	or	or

Please mark X in the 'Pensioner' box if you are chargeable to 'Schedule E' tax on a retirement pension. If you fall into more than one category please mark X in the most appropriate box
If other, please specify

What is your Gross Annual Income - please indicate which income band applies to you:

Under £10,000 <input type="checkbox"/>	£10,000 to £14,999 <input type="checkbox"/>	£15,000 to £19,999 <input type="checkbox"/>	£20,000 to £24,999 <input type="checkbox"/>	£25,000 to £29,999 <input type="checkbox"/>	£30,000 to £39,999 <input type="checkbox"/>	£40,000 to £49,999 <input type="checkbox"/>	£50,000 or more <input type="checkbox"/>
or	or	or	or	or	or	or	or

2. Member and/or Employer Payments

General Notes on Payments

- If you are self-employed any payments made from the partnership bank account should be reimbursed, as applicable.
- If you 'recycle' a tax-free lump sum you may face a tax charge. Factsheet FGEN449 'Recycling of lump sums' explains what recycling means and what the tax consequences are.
- Single payments must be made by cheque.
- Remember to enclose the cheque(s) with this application form.

2a Details of your Payments

Single Payments

If making a single payment please state the **GROSS** amount. £

Cheques must be for the NET amount (i.e. less basic rate tax) and made payable to Fidelity.

Please state the (NET) cheque amount. £

2b Employer's Details

You only need to complete this section, and Section 2c, if your employer is making payments to your plan. Otherwise, go to Section 2d.

Employer's Name

Company Address
Building Name and/or Number and Street, City, County and Country Details

Postcode

 -

Concurrence YES **OR** NO

1. Are you a member of your employer's occupational pension scheme?

An occupational pension scheme is an employer's pension scheme which promises to provide you with a pension and/or a lump sum on retirement. It does not include:

- (i) any personal pension scheme, or group personal pension scheme, even if your employer pays into it;
- (ii) any stakeholder pension scheme, or group stakeholder pension scheme, even if your employer pays into it;
- (iii) any scheme which pays benefits only on your death; or
- (iv) any scheme which is not registered with HM Revenue & Customs.

The scheme is not necessarily run directly by your employer. It may be a scheme for employees within a particular trade or industry run by a representative body and to which your employer pays.

2. Have you opted out of an occupational pension scheme or are you planning to opt out of an occupational pension scheme in favour of making payments to this plan? **OR**

3. Have you chosen not to join an occupational pension scheme which you are currently eligible to join, or which you will be able to join at the end of a specific waiting period, in favour of making payments to this plan? **OR**

Once you have answered these questions please go to Section 2c.

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2c — Details of your Employer's Payments

Single Payments

If your employer wants to make a single payment please state the **GROSS** amount. £

Your employers cheque must be for the **Gross** amount and made payable to Fidelity.

2d — Source of Wealth

Due to Financial Services Authority (FSA) requirements we are required to obtain information about the source of your payment before we can accept your application. Please indicate below how you acquired the money you are investing.

Salary/ Bonus	Compensation payment	Inheritance	Sale of company	Divorce settlement	Lottery/ betting win	Sale of investments	Gift	Savings	Policy claim/ maturity	Sale of property	Other (please give details)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If other, please specify

2e — Money Laundering Regulations

To comply with Money Laundering Regulations 2007, FundsNetwork and/or Standard Life 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 your credit history (but 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. If the on-line check does not confirm your identity, FundsNetwork and/or Standard Life will carry out a manual check.

OFFICE USE ONLY

3. Commission/Fees and Investing Your Payments

General Notes on Commission

- Initial Commission: we will take a charge of 0.1% for each 0.1% of commission we pay, up to a maximum of 5% of the total payment
- Fund Based Renewal Commission: we will take a charge at a yearly rate of 0.01%, which will be deducted from your plan for every 0.01% of commission we pay, up to a maximum of 0.5%
- Fund Based Renewal Commission can continue after age 75 if you choose Alternatively Secured Pension (ASP).
- Funded Initial Commission: we will take a charge of 0.2% for each 1% of commission taken for 6 years.
- If Funded Initial Commission is selected and you buy an annuity or make a transfer payment within 6 years, a transfer charge will apply
- Funded Initial Commission is not available if you are aged 69 or over.
- Funded Initial Commission is not available if the single payment(s) is under £10,000

3a Commission and/or Fees for your Intermediary

If your Intermediary is not taking commission and/or fees, go to Section 3b.

- Please tell Standard Life what commission and/or fees you wish to pay your Intermediary. You have a choice between fees, commission charges or a combination of the two. The maximum fee or commission paid is 5% of the total payment.
- If you have chosen Fidelity/FundsNetwork funds, your Intermediary will be paid Fund Based (Trail) Commission on a quarterly basis at the FundsNetwork default rates. Your Intermediary can give you more information about commission payable on this investment.

Commission Types

Commission Mix Guidance Notes

Intermediaries can take a mixture of Initial Commission and Funded Initial Commission but please note that the maximum mix is 5%, of which Funded Initial Commission cannot exceed 3%.

Fund Based (Trail) Commission is automatically paid at the FundsNetwork default rates, in addition to all other options available.

Additional SIPP wrapper based renewal commission can be considered independently of any other commission types.

Commission Reminder		Initial Commission	Funded Initial Commission	Fund Based (Trail) Commission	Fund Based Renewal Commission
		Max 5% (steps of 0.1%, a one-off charge taken from your plan)	Max 3% (steps of 0.1% a monthly charge taken from your plan for 6 years)	Automatically paid at the FundsNetwork default rates, in addition to all of the other commission options shown.	Max 0.5% (steps of 0.1%, an annual charge) - this type of commission is taken on an ongoing basis, and is calculated on the total value of your SIPP.
Payment Type	Your single payment	% only <input type="text"/>	% only <input type="text"/>	See note 2, above	% only <input type="text"/>
	Your employer's single payment	% only <input type="text"/>	% only <input type="text"/>	See note 2, above	% only <input type="text"/>

Please note:

Fund Based (Trail) Commission is the underlying trail commission automatically paid from investments in the FundsNetwork mutual fund range. It is paid on a quarterly basis.

Fund Based Renewal Commission is available yearly or monthly. We will pay yearly unless specified.

Please mark an X in the box if your Intermediary would prefer to receive monthly payments.

Intermediary Fees

Please indicate either a monetary or a percentage amount. If your Intermediary is VAT registered, remember to add the VAT amount.

Initial Fee £ or %
 or
 Yearly Fee £ or %

Frequency — If you have chosen a yearly fee, please specify the frequency of payment required.

Monthly or Quarterly or Half Yearly or Yearly

All amounts are paid in arrears. If you want amounts paid in advance, please notify us in writing.

Please state when you want to start paying the fee / / **2 0 0**

If you have chosen to pay a yearly fee, how long do you want to pay this for?

For the lifetime of the plan Other, please specify term /

The yearly fee you give here replaces any previous yearly fee you have asked us to pay to your Intermediary.

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Important Notes:

'Other Investments' (which are referred to as non-core investments in the Key Features Document - FSIPP17) are investments other than your investment in FundsNetwork funds or the Standard Life Investment Policy which are 'Core Investments'. We will make any other investments you have instructed us to make, as and when there is enough money in the SIPP Bank Account.

To enable us to make any 'Other Investments' you must tell us the full name of the investment you wish to purchase, the provider's name and specific amounts you wish to invest. If you wish to invest in any other insurance company's product where a formal application form is required, we will need a blank application form (from that provider), along with the completed SIPP Application Form. Once we have completed the form, we will send it direct to the product provider with the appropriate funds. There may be a delay in carrying out any investment instructions until all documentation has been received.

If you wish to invest in commercial property, please provide details in this section and attach the Property Information Questionnaire (SLSIP83) along with this application.

Investment Description	Single Payments (%)
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %

SIPP Bank Account %

I have chosen an Income fund and would like my income to be paid into the SIPP Bank Account (Please mark an X in the box)

The 'SIPP Bank Account' is a bank account owned and used by Standard Life Trustee Company Limited (the scheme trustee). The rate of interest for this account is currently 1% below the Bank of England base rate.

This account can be used to provide:

- any money required to purchase any investments
- any tax-free lump sum or income required immediately
- any money that is required to pay any charges
- an investment opportunity or a facility to maintain cash on deposit.

Please ensure that you set aside enough money in the SIPP Bank Account for your purposes.

If you are invested in Standard Life Investment Policy funds, you can choose to pay commission by cancelling units in these funds.

3c — Execution Only Stockbroker

Do you wish to appoint the specially arranged Execution Only Stockbroker? YES or NO

An Execution Only Stockbroker carries out trades on your, or if you prefer, your Intermediary's instructions.

4. Declaration & Signature

4 — Declaration & Signature - you must sign and date the form below

Important notes

Revenue Warning

This application will also be used as an application for tax relief at source. If you give false information you may be prosecuted.

Declaration by Standard Life

If Standard Life Assurance Limited accepts this application, it hereby agrees as administrator and provider in terms of the rules of the Fidelity Self Invested Personal Pension Scheme to administer the Scheme as required by the rules.

Your Declaration

1. I can confirm I am resident in the United Kingdom for tax purposes.
2. I, the person named in Section 1 of this application, request that the benefits described in or arising from payments specified in the application be provided for me under the Fidelity Self Invested Personal Pension Scheme, and in consideration of its acceptance I undertake to be bound in all respects by the rules of the Scheme in force from time to time.
3. I declare that to the best of my knowledge and belief, the statements made in this application whether in my handwriting or not, are correct and complete.
4. I request the trustee to appoint the investment manager(s), if any, named in Section 3b of this application.
5. I agree to my Intermediary receiving the fees and/or commission described in Section 3a.
6. I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004, will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year. (The 'basic amount' for the 2008-2009 tax year is £3,600 gross. This may change in future tax years.)
7. I declare that I will tell Standard Life if an event occurs (such as those listed in my Key Features Document - FSIPP17) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the events occurs, or within 30 days of the event if this is later.

Signature (YOU MUST SIGN HERE - Please ensure all relevant sections are completed as per the instructions on this form)



Date / / 2 0 0

This application form is issued by Standard Life. Standard Life is authorised and regulated by the Financial Services Authority. FSIPP31

If you have any queries about this form please ask your Intermediary or ring FundsNetwork's ServiceLine on 08457 44 66 00. Please send your completed form to your Intermediary or to Fidelity International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.

The FundsNetwork service is offered and managed by Financial Administration Services Limited. The FundsNetwork SIPP is provided and administered by Standard Life Assurance Limited. Fidelity only gives information about its own products and services and does not provide investment advice based on individual circumstances.

Financial Administration Services Limited (a Fidelity International Group company) is registered in England and Wales (No. 1629709) Registered office Oakhill House, 130 Tonbridge Road, Hildenborough, Tonbridge, Kent, TN11 9DZ. Standard Life Assurance Limited is registered in Scotland (SC286833) Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH. Both companies are authorised and regulated by the Financial Services Authority. Calls may be recorded and monitored to help improve customer service.