

The Fidelity Personal Pension is a version of the FundsNetwork SIPP provided by Standard Life. Standard Life Assurance Limited is the provider and administrator of the scheme and Standard Life Trustee Company Limited is the trustee of the scheme.

SIPP Application Form for Single Payments to an Existing Plan for Direct Investors

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

90542

Source Code

The FundsNetwork™ platform is a service provided by Financial Administration Services Limited (referred to herein as "FundsNetwork"), which is a Fidelity Group Company. When we refer to "Standard Life" we mean "Standard Life Assurance Limited". Fidelity, Fidelity International, the Pyramid Logo, FundsNetwork™ and the FundsNetwork® logo are trademarks of Fidelity International 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.

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 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

If you have never been issued with a National Insurance Number please mark an X in the box.

Date of Birth

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

Married/Civil Partnership	Single	Separated	Divorced	Widowed
<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 Fidelity International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.



1 Planholder's Details (continued)

Occupation

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

Employed <input type="checkbox"/>	OR	Self-Employed <input type="checkbox"/>	OR	Not Employed <input type="checkbox"/>	OR	Full Time Education <input type="checkbox"/>	OR	Pensioner <input type="checkbox"/>	OR	Carer for a person under age 16 <input type="checkbox"/>	OR	Carer for a person over age 16 <input type="checkbox"/>	OR	Under 16 <input type="checkbox"/>	OR	Other <input type="checkbox"/>
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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"/>	OR	£10,000 to £14,999 <input type="checkbox"/>	OR	£15,000 to £19,999 <input type="checkbox"/>	OR	£20,000 to £24,999 <input checked="" type="checkbox"/>	OR	£25,000 to £29,999 <input type="checkbox"/>	OR	£30,000 to £39,999 <input checked="" type="checkbox"/>	OR	£40,000 to £49,999 <input checked="" type="checkbox"/>	OR	£50,000 or more <input type="checkbox"/>
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2. Member and/or Employer Payments - Single Payment(s)

2a Details of your Payments

Single Payments

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.

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

Single payments must be made by cheque and should be made payable to Fidelity.

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

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Concurrency YES or NO

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

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.

2c Details of your Employer's Payments

Single Payments

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

Single payments must be made by cheque and should be 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 <input checked="" type="checkbox"/>	Compensation payment <input type="checkbox"/>	Inheritance <input type="checkbox"/>	Sale of company <input type="checkbox"/>	Divorce settlement <input type="checkbox"/>	Lottery/betting win <input type="checkbox"/>	Sale of investments <input checked="" type="checkbox"/>	Gift <input checked="" type="checkbox"/>	Savings <input checked="" type="checkbox"/>	Policy claim/maturity <input type="checkbox"/>	Sale of property <input type="checkbox"/>	Other (please give details) <input type="checkbox"/>
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If other, please specify

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90543

2. Member and/or Employer Payments - Single Payment(s) (continued)

2e Cheque Details

Your cheque must be for the NET amount. Your employer's cheque must be for the GROSS amount. All cheques should be made payable to 'Fidelity'. Remember to enclose the cheque(s) with this application form.

Please indicate the amount of the cheque

£

If you and your employer are both making single payments, give the total of your net payment and their gross payment.

2f Money Laundering Regulations

To comply with Money Laundering Regulations 2003, 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.

3. Investing Your Payments

General Notes on Investment Instructions

We will process all payments as per the instructions you give in the Application Form. As we do not know when the money will be available we cannot guarantee any asset or fund prices.

3a Investment Instructions

You can find details of all the investment options available by asking FundsNetwork or looking on www.fundsnetwork.co.uk.

Please add your investment instructions below. Please note that there must be sufficient money within the SIPP Bank Account to pay for these instructions.

Single Payment Instructions

Important Note: FUND CODE DETAILS ARE MANDATORY and must be completed in order for us to process your instructions. When completing Fund Name information please ensure that you specify either an 'income' or an 'accumulation' version of your chosen fund. If you do not include this information, your fund choice will default to the 'accumulation' version.

Funds

(Please note, you should either state a monetary amount, or a percentage. You should not mix the two.)

Fund Code	Fund Name		Single Payments (£)	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"/>	£	<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"/>
<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"/>	£	<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"/>
<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"/>	£	<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"/>
<input type="text"/>	<input type="text"/>	£	<input type="text"/>	<input type="text"/>

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
- 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.

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 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 2007–2008 tax year is £3,600 gross. This may change in future tax years.)
5. I declare that I will tell Standard Life if an event occurs such as those listed in the Key Features Document - FSIPP17d 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.

Fidelity and other members of the Fidelity International group of companies may use your personal information to tell you about investment products and services we believe may be of interest to you. If you do not wish for your personal information to be used in this way, please put a cross in this box.

You may ask us at any time to stop sending you marketing materials.

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



YOU MUST SIGN HERE



Date

D, D / M, M / 2, 0, 0, Y

OFFICE USE ONLY

This application form is issued by Standard Life. Standard Life is authorised and regulated by the Financial Services Authority. FSIPP31d

If you have any queries about this form please ring FundsNetwork's ServiceLine on 0800 08509230
Please send your completed form to Fidelity International (IMS), PO Box 80, Tonbridge, Kent TN11 9YA.

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