

Filling in this form

This form should only be used by the trustees of an existing trust where they wish to invest some of the trust monies in a life investment policy with Standard Life and the relevant Synergy Investment Bond or Synergy Regular Invest application has been completed.

Standard Life does not give financial and/or legal advice. We strongly recommend you seek professional advice.

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All trustees should be resident in Ireland. If not, there may be legal and/or tax implications.

Trust details

Name of Trust

Names of Beneficiaries

Trust date (DD/MM/YYYY) If a charity, please give registered number **C H Y**

Does the Trust allow for authorised signatories to sign on behalf of all trustees? Yes No

If yes, what are the criteria/restrictions?
(for example, at least 2 must sign, 3 for transactions €50,000+)

Give details of all the trustees, authorised signatories and/or Settlers (and tick as appropriate)

1 Title Trustee and/or Authorised Signatory and/or Settlor

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY)

Nationality

Authorised signatory: normally a trustee or officer delegated to sign on behalf of all the trustees as set out in trust. For example, 2 trustees may be authorised signatories to jointly sign on behalf of a trust with 4 trustees.

The Settlor is the person who created the trust, to be run by the Trustees.

If you have dual nationality/citizenship, please give details.

Privacy notice

We collect, process and maintain customer personal information and apply safeguards to ensure that it is protected and used in accordance with data protection law. To read our Privacy Policy, visit www.standardlife.ie/privacy

Trust details (continued)

2 Title Trustee and/or Authorised Signatory and/or Settlor

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY) Nationality

3 Title Trustee and/or Authorised Signatory and/or Settlor

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY) Nationality

4 Title Trustee and/or Authorised Signatory and/or Settlor

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY) Nationality

5 Title Trust Protector (if any)

First names (in full)

Surname

Address

Date of birth (DD/MM/YYYY) Nationality

The Settlor is the person who created the trust, to be run by the Trustees.

If you have dual nationality/citizenship, please give details.

In certain circumstances, a Protector may have been appointed to represent the interests of the Settlor in the administration and management of the Trust. A Protector is not a Trustee.

Politically exposed persons

We are required to identify politically exposed persons (PEPs) under anti-money laundering regulations. If you are a PEP, or a close relative or close associate of a PEP, we must apply enhanced customer due diligence procedures. You may be required to provide additional information and documentation (such as your source of funds, wealth, and identity).

A PEP is an individual who is, or has at any time in the last 12 months held one of the following positions, in Ireland or abroad:

- head of a state or government, or a minister
- member of a parliament or similar legislative body
- member of the governing body of a political party
- member of a supreme court, constitutional court or other high-level judicial body
- member of a court of auditors or board of a central bank
- an ambassador, chargé d'affaires or high-ranking officer in the armed forces
- member of an administrative, management or supervisory body of a state-owned enterprise
- director, deputy director, or member of the board of (or person performing the equivalent function in relation to) an international organisation

Are you, or any other party to this application, now, or previously been a

- politically exposed person (PEP)
- close relative of a PEP, or
- close business associate of a PEP?

Yes No

If yes, please give details.

Role* in policy	Role holder's name	Role holder's relationship to PEP	PEP	Position held by the PEP
<i>For example, trustee</i>	<i>Anne Murphy-Smith</i>	<i>daughter-in-law</i>	<i>Hugo Smith</i>	<i>Director, UK Post Office</i>

*Settlor, beneficiary, trustee or trust protector.

Foreign Account Tax Compliance Act and Common Reporting Standard

Are any of the Trustees, Beneficiaries or Protector a resident for tax purposes outside the Republic of Ireland? If yes, please give their names and details:

Yes No

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution? Yes No

If yes, please provide your GIIN

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution? Yes No

If yes, please provide your GIIN

Name

Country

TIN

Country

TIN

If you are a trustee, are you a financial institution? Yes No

If yes, please provide your GIIN

If you need more space to list them all and/or all their tax residences, please copy this page.

Your declaration

We, the authorised signatories of this Trust, confirm that

- we are acting on behalf of and for the exclusive benefit of the Trust
- the trustees have authorised us to act on behalf of all the trustees in respect of this investment
- all investment instructions are and will be made in line with any investment restrictions which may apply to this Trust and applicable law
- this Trust has the power to invest in a life investment policy
- this Trust has an insurable interest in the lives assured named in the application form
- we have obtained (or had the opportunity to obtain) independent legal and financial advice before making this investment

If there are no authorised signatories delegated to sign on behalf of all trustees, all trustees must sign.

This declaration may be executed in a number of counterparts, each of which will be deemed to be an original, but all of which will constitute one and the same instrument.

Signature

(all authorised signatories must sign)


Signature

Date

(DD/MM/YYYY)

Name

Signature


Signature

Date

(DD/MM/YYYY)

Name

Signature


Signature

Date

(DD/MM/YYYY)

Name

Signature


Signature

Date

(DD/MM/YYYY)

Name

- I, as Trust Protector, agree that the trustees can make this investment

Trust Protector's signature


Signature

Date

(DD/MM/YYYY)

Name

What should accompany this declaration?

- The Trust's completed Synergy application
- Where the Trust's beneficiaries are named, a list of beneficiaries together with their individual answers to:
 1. Nationality, and if you have dual nationality/citizenship, please give details
 2. If you are a Policy owner, are you resident for tax purposes anywhere other than the Republic of Ireland? and
 3. If yes, please tell us where and give us your relevant Taxpayer Identification Numbers (TINs)
- Identification documents (certified) of all authorised signatories, and Protector (if any). If a trustee is a company, verification and identification will be required for principal shareholders, directors and authorised signatories. For more information, see page 4 of the Additional declaration by company as policyowner (CD).
- If a charity and claiming exit tax exemption, the Revenue Declaration referred to in Section 730D(2)(b) of the Taxes Consolidation Act, 1997.

For more information on identification documents, see Synergy application.

(01) 639 7000 www.standardlife.ie customerservice@standardlife.ie

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