

CIB30SI

What this form is for?

This form should be used to make a first or additional investment in Standard Life's Capital Investment Bond. If you are receiving advice from an Independent Financial Adviser, remember that the adviser is acting on your behalf, not only by giving you advice, but also regarding how this form is filled in.

Filling in this form

By filling in this form you are applying for a Capital Investment Bond which is made up of one or more separate policies. Each policy is evidence of a contract between you and Standard Life. This application will be the basis of each contract if you accept any offer of cover made by us. We will be pleased to provide a copy of the terms of the contract (and a copy of your completed Application) 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.

This application form is for a UK policy and is for use by UK residents only.

Please make sure you complete all parts of this form.

Part 1 Personal details about the life/lives assured

You are the 'life assured' if payment of the proceeds of the bond depend on your life. If your bond will depend on the lives of more than two people, then please ask for the Additional Lives Assured form GEN233.

Please note that, under Standard Life's governing regulations, there will only be one member of the Company in respect of the bond, even if it is owned by more than one person.

Unless we receive a specific nomination from all the bond owners, the member will be the surviving bond owner who is named first on the policy schedule.

Life A (BLOCK LETTERS)

Sex Male Female

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Surname

First names (in full)

Current address

Postcode

Date of birth D/M/Y

Telephone - home (inc. STD code) Telephone - work (inc. STD code)

Marital status Single Married
Separated Divorced Widowed

Please tick if you are already a Standard Life customer.

Life B (BLOCK LETTERS)

Sex Male Female

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Surname

First names (in full)

Current address

Postcode

Date of birth D/M/Y

Telephone - home (inc. STD code) Telephone - work (inc. STD code)

Marital status Single Married
Separated Divorced Widowed

Please tick if you are already a Standard Life customer.

What is the relationship between the lives assured?

Part 4 Setting up a bond under trust Continued

2. Was your original investment under trust? Yes No

If 'Yes', please attach the trust wording and go straight to Part 6.
If 'No', please answer question 3.

3. Do you want your bond written under trust? Yes No

If 'Yes', please attach the trust wording and go straight to Part 6.
If 'No', please go straight to Part 6.

Part 5 Details of the bond owner

Complete only if this is your first investment in a new bond.

Who is the bond owner? The bond owner will own the bond and normally receive the proceeds.

Life A only Life B only Both/All lives assured Other*

*If 'other', please give full names, addresses and telephone numbers below.

Details of 'other' bond owners

If the bond owner is different from the life/lives assured, please give the relationship.

Please note that, under Standard Life's governing regulations, there will only be one member of the Company in respect of the bond, even if it is owned by more than one person. Unless we receive a specific nomination from all the bond owners, the member will be the surviving bond owner who is first named on the policy schedule.

Members whose plan do not entitle them to share in the Company's profits are not entitled to vote at Company meetings.

An example of the relationship might be "Parent/ Child" or "Trustee/Beneficiary".

Part 6 Regular withdrawals

Not available from the Distribution Fund.

If you want to make regular withdrawals from your bond, show the percentage of the total amount invested (excluding the amount invested in the Distribution Fund) or the **total amount** you want to withdraw **each year** in the appropriate box below. Regular withdrawals are not available from the Distribution Fund.

Stepped option

% each year or

(maximum allowed is 7.5%)

Level option

% each year

or £ each year

£ each year

(maximum allowed is the monetary value of 7.5%)

Tick the appropriate box to show how often during the year you want to make withdrawals.

Once a year Every 6 months Every 4 months Every 3 months Every month

On what date do you want your first regular withdrawal to be paid?

D/M/Y

Payments can be made from 1-28 of the month.

If you are not investing in the Distribution Fund, please go straight to Part 7.

If you are an existing policyholder and are adding to your investment, please tell us in the boxes opposite only how you wish to take your withdrawals for the new money.

You cannot take regular withdrawals of more than 7.5% a year of the total amount invested if you have chosen the Stepped option.

The minimum regular withdrawal you can take is £50.

Part 7 'Income' payment details

Complete only if you are investing in the Distribution Fund.

If you are an existing policyholder and are adding to your investment, your income will be paid out on the same basis as it currently is.

The minimum Income payment you can take is £50.

You cannot take regular income distributions of more than 7.5% a year of the total investment paid if you have chosen the Stepped Option.

Please complete either A or B below. The 'income' specified applies to this investment only.

A Please pay an 'income' of:

the full distribution OR % of this investment a year OR £ a year.

The 'income' should be paid:

every month every 3 months every 6 months according to your instructions above.

The Distribution Dates are 16 August and 16 February. If you would like to select one of the following options please tick the appropriate box – otherwise go to Part 8. These options are not available for additional increments

I would like my first payment to be:

Paid on the first 16th of the month following my investment

Deferred to the second Distribution Date after my initial investment

A proportion of the full amount.

B Please reinvest the income in the Distribution Bond.

Part 8 Authority for payment

Please tell us below which bank account you would like your money paid into.

Name and address of Bank/Building Society	Bank account number	<input type="text"/>
	Bank sort code	<input type="text"/>
	Name of account holder(s)	<input type="text"/>
Postcode		<input type="text"/>
	Building Society roll number	<input type="text"/>

Part 9 Data Protection Notice

Important, to be read by all lives assured and bond owners.

All parties named on this form have a right to know that Standard Life holds personal data about them and what purposes it will be used for. Please give them an opportunity to read this notice.

Personal information provided in connection with your application will be used by Standard Life to set up and administer your bond. If your application does not proceed it will be held on our records for 6 years before it is deleted.

We will keep the information you have supplied confidential, and will not disclose it unless it is lawful to do so.

If you have appointed a financial adviser, we will give him information about the policy and, where appropriate, send copies of correspondence to him to enable him to give you advice.

We and the other members of the Standard Life Group would like to contact you from time to time to keep you up to date with special offers, new products and services, newsletters and other promotions. We will never pass your details outside the Standard Life group of companies for marketing purposes.

If you do not want to be kept informed, please tick this box.

If you would like to request a copy of the personal data we hold about you, please write to the Data Protection Co-ordinator at our Head Office. We may charge a fee for providing the information.

Part 10 Money laundering

To comply with Money Laundering Regulations 2003, we 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 whether you have a credit history (but it 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. We regret that we cannot offer an alternative unless the on-line check does not confirm your identity, in which case we will carry out a manual check.

Part 11 Declaration

To be completed by all the bond owners.

I/We, the person taking out the bond in which I/we have an interest, agree that the answers given in this form are true and complete to the best of my/our knowledge and belief, and that the answers to any questions which the life/lives assured may be asked in connection with this application, will form part of this application.

I/We understand that should Standard Life demutualise within a period of 3 years from the date this application is received by Standard Life, no compensation for loss of membership rights will be payable in respect of the premiums set out in this application.

I/We have read and understood the Data Protection Notice. I/We agree that my/our personal information (including sensitive data) may be used for the purposes described (subject to me/us exercising my/our right not to be contacted with details of other products and services).

I/We understand that, in terms of the Company's governing regulations, in the absence of a specific nomination, the person who is first named as bond owner or person assured on the policy schedule will be a member of the Company

▶	Signature	Date
▶	Signature	Date
▶	Signature	Date
▶	Signature	Date
▶	Signature	Date
▶	Signature	Date

On the later of the dates we receive your fully completed application, cheque and trust wording (where applicable), we will buy units for you in the funds you have chosen. If you do not send all of the relevant documentation together, units will not be bought until everything has been received and you accept any offer of cover made by us.

To be completed by your IFA or for office use only

Financial adviser's details

FSA or Authorisation Number	Status of Client (eg. execution only)
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Name of Contact
Location

The Standard Life Assurance Company* is a mutual company registered in Scotland (no SZ4) Head Office Standard Life House 30 Lothian Road Edinburgh EH1 2DH Tel (0131) 225 2552 Standard Life may record and monitor telephone calls to help improve customer service.

The Standard Life group includes Standard Life Pension Funds Limited* SLTM Limited* Standard Life Investments (Mutual Funds) Limited*

*Authorised and regulated by the Financial Services Authority

www.standardlife.co.uk

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