

Contact Sheet

Submitting New Business

All documents should be uploaded to the client's Document Library for security purposes and not emailed. Confirmation should be sent to the relevant teams.

Process	Documents to complete	Send confirmation to:
Open a new Wrap Account	<ul style="list-style-type: none"> • Wrap Terms and Conditions • Wrap ISA Cash Transfer In • Wrap ISA and Personal Portfolio Transfer Re-Registrations • Wrap SIPP Cash Transfer In • Wrap SIPP In-Specie Transfer In • Wrap Direct Debit Instruction 	wrap_money_in@standardlife.com Wrap New Business Page
Existing client Wrap Transfer in	<ul style="list-style-type: none"> • Wrap ISA Cash Transfer In • Wrap ISA and Personal Portfolio Transfer Re-Registrations 	transfers_in@standardlife.com
Existing client SIPP Transfer in	<ul style="list-style-type: none"> • Wrap SIPP Cash Transfer In • Wrap SIPP In-Specie Transfer In • Wrap SIPP Defined Benefit Transfers 	wrap_nb@standardlife.com sipp_inspecie@standardlife.com Via Post (If Guarantee Date < 5 working days, please email documents to wrap_transfers@standardlife.com as well as posting)
Existing client new Direct Debit	<ul style="list-style-type: none"> • Direct Debit Instruction 	wrap_servicing@standardlife.com



Platform Contact Centre: 0345 279 1001

Opening Hours 9am – 5:30pm

We may monitor and/or record calls to protect you and us, and help with our training. Call charges will vary.

Contact Sheet

Servicing your Existing Clients

Process	Requests to submit	Send confirmation to:
Servicing	<ul style="list-style-type: none"> • Change of Adviser or Letter of Authority • Power of Attorney • Linking for Family/Couples Terms • Updates to Trust Servicing • Refund Contributions (where applicable) 	<p>wrap_servicing@standardlife.com wrap_sipp@standardlife.com (SIPP only requests)</p> <p>Requests are automated and will be reviewed within service level agreements.</p>
Large Case Terms Requests	<ul style="list-style-type: none"> • Plan > £1 million • Include a charges summary with the request 	<p>north_distribution@standardlife.com south_distribution@standardlife.com telephony_distribution@standardlife.com</p>
Off Platform Investments	<ul style="list-style-type: none"> • External DFM/Investments 	<p>sippserv_trades@standardlife.com (SIPP) service@standardlife.ie (Offshore Bonds)</p>
Wrap Money Out	<ul style="list-style-type: none"> • Onshore Bond Surrender • CHAPS – Chaps Request Form • MCA – Money Movement Form • Account Closure 	<p>wrap_money_out@standardlife.com</p>
Wrap SIPP Drawdown	<ul style="list-style-type: none"> • Full or Phased Drawdown • Stop or amend existing payments • Apply Price Lock • Request a Quote 	<p>nontelephony.drawdown@aberdeen-asset.com</p> <p>If requesting Drawdown, the form must also be uploaded to the Wrap Platform Document Library</p>
Platform Deceased Accounts	<ul style="list-style-type: none"> • Notification of bereavement • Death Certificate • Legal Documents • Instruction of death benefits 	<p>platforms_deceasedaccounts@standardlife.com (ISA, PP, Onshore Bonds) sipp_bereavements@standardlife.com (Wrap SIPP) service@standardlife.ie (Offshore Bonds)</p>

Contact Sheet

Sales Enquiries

Team	Requests	Please use mailboxes to submit new business or provide new instructions for existing clients
Sales Enablement	For all new business enquiries relating to Standard Life Wrap and Elevate.	sales_enablement@aberdeen-asset.com www.standardlifeadviser.co.uk/adviser/get-in-touch.page
Aberdeen Standard Capital	For all new business enquiries relating to the suite of ASC investment options.	0345 279 8880 asc@aberdeenstandard.com www.aberdeenstandardcapital.com/en/contact-us
Aberdeen Standard Investments	For all new business enquiries relating to the suite of ASI investment options.	retail.salessupport@aberdeenstandard.com
Phoenix – Off Platform	For all new business enquiries relating to the suite of Retail propositions.	0345 607 0216 SL_distribution@standardlife.com
International Portfolio Bonds	For all queries on International Portfolio Bonds.	0345 300 4273 service@standardlife.ie Contact centre is open from 9am to 5pm Monday to Friday.

We may monitor and/or record calls to protect you and us, and help with our training. Call charges will vary.

We can't guarantee that we'll receive any email you send or that it won't have been tampered with. You shouldn't send personal details by email.

Standard Life Savings Limited is provider of the Wrap Platform, Wrap Personal Portfolio and Wrap ISA. Standard Life Assurance Limited is the provider of the Onshore Bond for Wrap and the Standard Life Self Invested Personal Pension Scheme. Standard Life Trustee Company Limited is trustee of the Standard Life Self Invested Personal Pension Scheme. Standard Life Savings Limited is registered in Scotland (SC180203) at 1 George Street, Edinburgh, United Kingdom, EH2 2LL. Standard Life Savings Limited is authorised and regulated by the Financial Conduct Authority. www.standardlife.com

Standard Life Assurance Limited (SC286833) and Standard Life Trustee Company Limited (SC076046) are both registered in Scotland at Standard Life House, 30 Lothian Road, Edinburgh, EH1 2DH. Standard Life Assurance Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. www.standardlife.co.uk

Standard Life International dac is authorised and regulated by the Central Bank of Ireland. Deemed authorised by the Prudential Regulation Authority. Subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. The nature and extent of consumer protections may differ from those for firms based in the UK. Details of the Temporary Permissions Regime, which allows EEA-based firms to operate in the UK for a limited period while seeking full authorisation, are available on the Financial Conduct Authority's website. Standard Life International dac, provider of the Wrap International Portfolio Bond, is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, Dublin 2.

Standard Life Savings Limited, provider of the Wrap platform, is registered in Scotland (SC180203) at 1 George Street, Edinburgh, United Kingdom, EH2 2LL, and authorised and regulated by the Financial Conduct Authority. www.standardlife.ie

Standard Life International dac is part of the Phoenix Group and uses the Standard Life brand under licence from the Standard Life Aberdeen Group. Standard Life Savings Limited is part of the Standard Life Aberdeen Group. You can find more information about Standard Life Aberdeen's strategic partnership with Phoenix at www.thephoenixgroup.com

ADV54 0621 © 2021 Standard Life. All rights reserved.

STA0621770686-001

Useful Links

- [Wrap New Business](#)
- [Wrap Platform Guides](#)
- [Wrap Servicing Requests](#)
- [Platform FAQs including bank details for payments](#)