



For adviser use only.

To complete this form Adobe Reader is required.

Section 1 - Client

Find Plan Number: WRAP Platform > Client > Charges > Charge Schedule > Select SIPP

Plan number

Title

Full name

Client Nationality



Please make sure there is enough money in the bank account to cover your trade request. Sufficient funds should also be made available for ongoing charges and drawdown payments once the investment has been made.

Please see the WRAP48 – Wrap Charges Guide for the applicable off platform charges.
This can be found at aberdeenadviser.com.

Section 2 - Type of Investment

Structured Product

External Bank Account (EBA)

Trustee Investment Plan

Discretionary Fund Manager (DFM)

Other (give details)



Section 3a – Investments

Investment Amount

£

Investment Company

Investment Name

If EBA what is the minimum rate you will accept?



(Rates offered by EBA can change and we will ask them for the rate you specify or to halt processing if it is not available, if no rate is specified then you will get the rate they are currently offering.)

As these investments are held off platform with another company it can take longer for the monies to be returned. We will not chase these companies until 2 weeks has passed from the date we issue them with our request.

Please contact the Investment Provider directly to ensure that Regular Withdrawals are allowed and what their requirements are.

Section 3b – Disinvestments

Disinvestment Amount

£

Investment Company

Investment Name

Is this disinvestment on Maturity?

Yes No

Section 3c – Regular Withdrawals

Investment Name

Amount

£

Frequency

Monthly Quarterly Yearly

Start Date

Section 4 – Additional Information

Has Advice been given?¹ Yes No

Is client aware of the FSCS & Exclusions?
(Required for EBA and Structured Deposits) Yes No

Has application form been attached?² Yes No

Have you provided AML documents if required?² Yes No

¹ If Advice has not been given and the external provider requires this we will be unable to proceed with your investment. The Wrap SIPP is an advice based product.

² If the application forms or AML documents have not been attached and the external provider requires these this could hold up the investment being made. Please only complete investment information, client details and adviser details on the application form, we will complete the rest. The client is not required to sign the forms.

³ For DFM requests the application form should be sent directly to the DFM as we do not require to see them.

Section 5 – Comments

Please tell us any additional relevant information that may help us to complete this Off Platform Trade request or if you have more than one instruction add the other details below based on the information in sections 2 and 3.

Section 6 – Adviser Details (All fields required)

I confirm I have read and understood the notes, caveats and declarations present in this form.

Full name

Email
(Work email address only)

Telephone

Date
(DD/MM/YYYY)

Signed
(Not required if uploaded to Platform)



Signature(s) required

Next Steps

1. Before adding a digital signature (if applicable), click 'Submit' button below to create email.
2. Upload the completed form to Platform > Client > Document Library and send email.
3. We will contact you using the email supplied in this form if we require any additional information and to confirm the instruction has been processed.



Filename must not contain special characters or capital letters and be restricted in length.

If email does not auto-generate after clicking Submit button, please send email manually (with plan number in subject line) to SIPPServ_Trades@Standardlife.com

Submit

For more information visit aberdeenadviser.com

Issued by a member of Aberdeen Group, which comprises Aberdeen Group plc and its subsidiaries.

Aberdeen Platform Limited is registered in Scotland (SC180203) at 1 George Street, Edinburgh, United Kingdom, EH2 2LL.
Aberdeen Platform Limited is authorised and regulated by the Financial Conduct Authority.

ADV59 1125 ©Aberdeen Group plc 2025. All rights reserved.