

Friends First SDIO – Pension Checklist

For investments through the [Friends First SDIO](#) platform:

Form(s) to be submitted to Friends First

- ✓ Friends First Application (once off to set up policy).
[Please click here to view Personal Pension Application Form.](#)
[Please click here to view Executive Pension Application Form.](#)
[Please click here to view PRB Application Form.](#)
- ✓ Friends First SDIO Investment Instruction.
*Please note 1 Investment Instruction is required per trade and per Bond investment i.e. for investment in 2 BCP Bonds, 2 instruction forms are required.
[Please click here to view SDIO Investment Instruction Form.](#)
- ✓ One (1) Certified Copy Photo Identification
- ✓ One (1) Certified Copy or Original Non Photo Identification (proof of address).