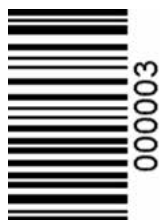




# PENSION LIFE COVER FOR PERSONAL PENSION PLANS DECLARATIONS



## Proposal Number:

Customer Review Number

Name Life Assured 1

Financial Adviser Name

**If you submit this proposal electronically you should only send us this section.**

Any words in the singular also mean the plural as applicable (e.g. "I" means "we" and "my" means "our" etc.)

## A. Declaration under regulation 6(3) of the Life Assurance (Provision of Information) Regulations 2001

### WARNING

If you propose to take out this plan in complete or partial replacement of an existing plan, please take special care to satisfy yourself that this plan meets your needs. In particular, please make sure you are aware of the financial consequences of replacing your existing plan. If you are in doubt about this, please contact your insurer or insurance adviser.

**Please complete this section by ticking the appropriate box:**

This includes:  
Canada Life  
Progressive Life

Yes, this plan is replacing an Irish Life plan

Yes, this plan is replacing a plan from another life company

No, this plan is not replacing another plan

Existing Plan Number

### Declaration of Insurer / Financial Adviser:

I hereby declare that in accordance with Regulation 6(1) of the Life Assurance (Provision of Information) Regulations, 2001,

Customer's name

Address

Address

has been provided with the information specified in Schedule 1 (Customer Information Notice) to those Regulations and that I have advised the customer as to the financial consequences of replacing an existing plan with this plan by cancellation or reduction, and of possible financial loss as a result of such replacement.



Please sign and date

Signature of Financial Adviser



Date (dd/mm/yyyy)

**Please be aware for all signatures typed herein,  
you are electronically certifying this document,  
just as if you were physically signing on paper.**

## Declaration of Customer:

I confirm that I have received in writing the information specified in the above declaration.



Signature of Customer



Date (dd/mm/yyyy)

**Please be aware for all signatures typed herein, you are electronically certifying this document, just as if you were physically signing on paper.**

## B. Plan Declaration

I understand and agree that information that I have provided in the declarations in this form, my completed application form (online or otherwise), any supplementary questions answered, any statements made to Irish Life in writing or by telephone, and / or any information I give to a medical examiner or nurse acting for Irish Life are material to the decision of Irish Life Assurance plc (Irish Life) to enter into this contract, on these terms and for the calculation of premium and that Irish Life has relied on this information in so doing. My contract with Irish Life comprises the plan schedule, the terms and conditions booklet and any extra rules which Irish Life head office staff may add in writing. I understand that this contract shall not be capable of being surrendered, commuted or assigned except as provided under Chapter 2 of Part 30 of the Taxes Consolidation Act 1997.

I have read and understand the important information about my obligation to answer all questions asked by Irish Life in connection with the application and I understand that if I do not answer these questions honestly and with reasonable care, Irish Life will be entitled (depending on the breach) to declare the plan void, refuse my claim, treat my insurance as if it was entered on different terms, or reduce my claim. If this happens, I understand and acknowledge there may be no cover under the plan, Irish Life may not refund my premiums and Irish Life may not pay a claim.

I declare that all answers I have provided, including those about tobacco consumption or use of nicotine replacement products including e-cigarettes, are true and complete. I declare that I have answered all of the questions in this form honestly and with reasonable care.

I understand that I must tell Irish Life in writing about any changes in my answers to the specific questions in this application form between the time I applied for cover and the date my application is accepted.

I understand that this plan will not start until Irish Life has accepted me for cover and I have paid the first payment. I acknowledge that a copy of my application will be sent to me and agree to notify Irish Life, in writing, if:

- I do not receive the printed record
- Any answer in this record is false, incorrect or incomplete

I understand that Irish Life can use my personal information for any subsequent applications to Irish Life.

I authorise Irish Life to request and receive my personal health information now (or as part of any claim assessment including after my death) from any health professional who at any time has attended me concerning my physical or mental health and to share my personal health information with any health professional for the purpose of processing my application and assessing claims.

- I confirm I have read and understood the Medical and Other Important Information section.
- I confirm I have received the product booklet and Customer Information Notice.
- I confirm I have been informed about the Irish Life Data Privacy Notice and where to get this.
- I confirm I have read and understood the Plan Declaration.



Signature of Customer



Date (dd/mm/yyyy)

**Please be aware for all signatures typed herein, you are electronically certifying this document, just as if you were physically signing on paper.**

## C. Optional Consent

### Consent to Sharing with Other Companies in the Irish Life Group

I agree to Irish Life Assurance sharing my personal information (excluding my personal health information) with other companies within the Irish Life Group, such as Irish Life Health. I understand this is to assist in developing combined customer services (for example, access to services from different Group companies on one online platform). This is an area that will continue to improve with a view to adding new customer engagement offerings.

You can change your mind at any time and opt-out of any further sharing by emailing [dataprotectionqueries@irishlife.ie](mailto:dataprotectionqueries@irishlife.ie) or writing to Irish Life Data Protection Team. If you opt-out we will keep a record of your instruction to opt-out.

Customer

I agree

I don't agree

