

Withdrawal Form

Please read the questions carefully before answering them and always use Block Capitals. If any item is blank or illegible, this will cause a delay in processing your withdrawal.

The value of your withdrawal will be based on the date we get all requirements. Cut off is 5pm. After 5pm, it will be based on the next days unit prices.

Section A

Irish Life Plan No

If you are resident outside of the Republic of Ireland, please read the 'Important points to note' for requirements.

Plan Owner 1 First Name:

Plan Owner 2 First Name:

Plan Owner 1 Surname:

Plan Owner 2 Surname:

Current Address:

Current Address:

Mobile & email make it easier for us to contact you if we need anything else for your withdrawal

Mobile:

Mobile:

Email Address:

Email Address:

Section B

Please tell us what sort of withdrawal you want to make:

1. I want to withdraw part of my savings € _____ from my plan
2. I want to fully withdraw all of my savings _____ Tick if required
3. I want to transfer (specify amount) € _____ into new plan number

***If you don't choose an option here, we will continue with your regular payments (where applicable)**

If regular premium please tick your preferred option.

1. I want to cancel my plan
2. I want to keep paying into my plan

Section C

IMPORTANT: Please note that the bank account details provided must be your own bank account details or an account held jointly by you. Payment CANNOT be made to a third party or to a third party account on personal plans. If you are claiming on behalf of a company, requirements may differ, please see overleaf..

Please enclose a copy of a recent bank statement dated within the last 6 months . This statement should be for the account you wish payment to be made into.

1. Pay by cheque
2. Pay to the account my direct debit is currently coming from (for this plan)
3. Pay to the below bank details

Name of bank

Address of bank

Account holders name

Bank Identifier Code (BIC)

IBAN

Your BIC and IBAN details can be found on your bank statement. You can also request them directly from your bank.

*Electronic Fund Transfer is the fastest & most secure method of payment. We would recommend to use this option over cheque payment where you can.

I/We have completed the above withdrawal instructions and wish to proceed with this request:

Please sign and date

Plan Owner 1 Signature: Date:

Plan Owner 2 Signature: Date:
(if applicable)



Please ensure that all plan owners have signed this form.

Note: We are unable to accept electronic signatures'

In the interest of customer service we will record and monitor calls.

Important points to note

We want to help you have the smoothest experience possible with us when it comes to making a withdrawal on your plan. To help with this we have some prompts on each section of the form itself to help understand the information & requirements we need & why we need them.

In case you still have some questions though, here is some extra information that may help:

What we need to pay your withdrawal request:

- ✓ Fill in sections A, B & C fully
- ✓ Make sure all plan owners have signed the form
- ✓ Provide your bank details if you want payment to a bank account otherwise we will send a cheque
- ✓ Make sure you have included valid photo id (in date Passport or Driving License) and proof of address (utility bill or bank statement dated within 6 months). If payment is going to your account, we need a copy of a bank statement for that account too for all plan owners.
- ✓ If you are non-resident, we need a 'Declaration of Residence outside of Ireland' form. Contact us on 01 7041010 to get a copy of this

For a plan in trust:

- ✓ Following the introduction of the Fifth Money Laundering Directive (5AMLD) in April 2021, you are required by law to register your Trust. Each EU Member State has now established a Central Register of Beneficial Ownership of Trusts (CRBOT). You, as Trustee of the policy, must now register details of your Trust on Revenue's CRBOT website.
- ✓ We will require a copy of the registration on the CRBOT. This should include details of the trustees and beneficiaries registered

If you are making a withdrawal on behalf of a company or charity, we need:

- ✓ We need your request on Company/Charity headed paper. You can use the savings withdrawal form as a guide to the information we need
- ✓ For Company: We need valid photo id (in date) and proof of address (must be dated within 6 months) of two company directors as well as all shareholders with a shareholding of >25%. For Companies, if you qualify for the corporate exit tax rate - Please include this statement: 'We are a corporate, as defined within Section 4(l) and for the purposes of Section 730(F) TCA 1997'
- ✓ For Charity; a completed 'Charity Declaration form'
- ✓ For both companies & charities, signatures of two authorised signatories
- ✓ We need to identify Politically Exposed People (PEP) or those who are a Relative or Close Associate (RCA), so, we may send you a form for this if needed

If your plan has benefits

- ✓ If you withdraw savings from a plan which gives you protection benefits, such as life or specified illness cover, your protection benefits will go down (for a joint/dual life plan, your benefits will go down for both lives covered). The reduction may depend on the value remaining in the plan, your current age, your current payment amounts and the level of cover you currently have.

When to expect hear from us about your claim:

- ✓ If we have your phone number, you will get a text to let you know we've got your withdrawal request
- ✓ We will contact you within 3 working days from then if we need anything else

When we have everything we need;

- ✓ We will process & pay your withdrawal claim
- ✓ You will get a letter letting you know your claim has been paid

How long will it take to get your money:

- ✓ If you are having it transferred into your account, it can take 3 to 5 days from when we paid it to see it in your account
- ✓ If you are expecting a cheque, you should expect it in your normal postal turnaround times

Is there anything that can slow down my claim?

We are committed to paying claims as efficiently as we can but we want to be sure we are Compliant with regulations affecting your request; mainly Anti Money Laundering Legislation (i.e. we need ID & proof of address if we haven't gotten this recently). Some of the most common things that can slow things down are;

- ✓ Signatures not matching – we may need you to sign a new form if this happens.
- ✓ Unclear ID, bank statements or proof of address
- ✓ If your name has changed from what we have on record. In this case, its best to send us proof of your name change with your initial request (e.g., State Marriage Certificate, Divorce decree, etc)



How to get in touch with us:

You can give Customer Service a call on **01 7041010**

You can also email us on **claimsupport@irishlife.ie**

Irish Life Assurance plc, trading as Irish Life, is regulated by the Central Bank of Ireland.

Irish Life Assurance plc, Irish Life Centre, Lower Abbey Street, Dublin 1.

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