



PRB TRANSFER OUT FORM

Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at www.irishlife.ie or you can ask us for a copy.

Section 1: Customer and employment details

Irish Life Reference Number

Customer Name

Date of Birth

Section 2: Transfer Options

Please tick one option below

(A) Transfer to an occupational pension scheme ☐

Please give the name of the employment the receiving scheme is in respect of

What is the Revenue approval or submission reference number of the receiving scheme?

Is the receiving scheme self administered? Yes ☐ No ☐

If you answer Yes to the above question we need a copy of the Revenue Approval letter in order to proceed.

OR

(B) Transfer to buy out bond / personal retirement bond ☐

OR

(C) Transfer to an overseas pension scheme ☐

Country where new scheme is contracted

Are you currently employed in that country? Yes ☐ No ☐

Note: In addition to this form the Overseas Transfer Form must be completed by the customer and the receiving scheme.

Section 3: Payment details

The cheque will be drawn in the name of the insurance company / trustee / PRSA provider to which the transfer is being made.

Name of insurance company

Cheque payee

Address to which the cheque will be sent

Receiving arrangement policy reference

Administrator Contact name

Section 4: Pension Adjustment Order

Has a Notice to Trustees been served in connection with a judicial separation or divorce of this customer?

Yes ☐ No ☐

Has a Pension Adjustment Order been issued or is in the process of being issued in respect of pension benefits held on behalf of this customer?

Yes ☐ No ☐

If Yes, please provide a copy of the Notice to Trustees or the Pension Adjustment Order.

If this section is not completed we will assume that a Notice to Trustees or a Pension Adjustment Order has not been issued on the pension plan.

Section 5: Customer Declaration

I confirm that I wish to transfer the benefits held under my Personal Retirement Bond / Buy Out Bond numbered above to the receiving pension arrangement (new scheme) as outlined in section 2. I understand that no pension and/or life assurance benefits will be provided to me under the Personal Retirement Bond listed in section 1 with effect from the date of transfer. In consideration of the payment of an appropriate transfer to the new scheme, I hereby release Irish Life from all liability to me in respect of benefits thereunder with effect from the date of transfer.



Please sign and date

- Signature of customer

X

Name in block capitals

Date _____