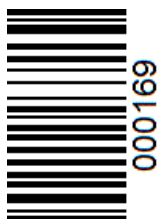


Personal Retirement Savings Account (PRSA)

Transfer in application form - Brokerage



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 <https://www.irishlife.ie> or you can ask us for a copy.

Please complete sections 1, 2, 3, 4 and 5 in all cases, plus the relevant sections outlined below.

Section 1 - Contributor details

Name

Date of birth

Existing PRSA plan number

Section 2 - Source of transfer

Where has the transfer value come from?

Tick as appropriate

1. An occupational pension scheme including AVCs (approved under the Finance Act 1972 or Chapter 1 Part 30 of the Taxes Consolidation Act 1997).
2. A retirement annuity contract (personal pension) (approved under S235 of the Income Tax Act 1967 or Chapter 2 Part 30 of the Taxes Consolidation Act 1997).
3. An existing PRSA product (approved under Part X of the Pensions Act 1990 and Chapter 2A, Part 30 of the Taxes Consolidation Act 1997).
4. A pension arrangement outside the State.

Irish Life's PRSA products are approved under Part X of the Pensions Act, 1990 as amended and Part 2A of the Taxes Consolidation Act 1997.

Section 3 - Financial adviser details

Financial Adviser name

Financial Adviser email address

Financial Adviser code

Section 4 - Transferring Life Office details

Life Office Name

Address

Transferring plan type (Occupational/PRSA/RAC) and reference number

Contact name

Contact Phone Number

Contact email address

Further information is required from the Life Office.

Note:

Irish Life will only accept cheques from the trustee/insurance company/PRSA provider transferring the pension fund.

5. Has the member left service with the relevant employer?	Yes	No
6. Is the transferring scheme being wound-up?	Yes	No
7. Where the transferring scheme is being wound-up, has the Pensions Authority been notified?	Yes	No
8. Has the member been provided with an explanation of any rights and options available on the wind-up of the scheme?	Yes	No
9. (i) Are all assets of the fund being transferred?	Yes	AVC only
or		
(ii) Is the transfer value made up of a return of the member's contributions where the member has not completed two full years service within the scheme and is not entitled to preserved benefits?	Yes	No

Note:
If AVC only please complete the separate Additional Information if PRSA is being used for AVCs.

Signed by
(Name in BLOCK LETTERS)

Please sign

Signature
Trustee of the main scheme

Second trustee
(Name in BLOCK LETTERS)

Please sign

Signature
Trustee of the main scheme

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

Date

Contributor Declaration

I understand that Irish Life is required to get information from the transferring trustees / life office / employer and I authorise them to give Irish Life this information. I wish to go ahead with this transfer and I confirm that no benefits have been paid to me under the scheme.

Signed by
(name in BLOCK CAPITALS)

Please sign and date

Signature
(Contributor / Applicant named on this application form)

Date

Section 7 - To be completed if transfer is from Retirement Annuity Contract (Personal Pension Plan)

No benefit should have been paid to the contributor under the original Retirement Annuity Contract (RAC) in the form of a tax-free lump sum, annuity or ARF option.

Value of assets being transferred: €

Name of insurance company holding the assets of the RAC:

Address of the insurance company:

Contributor Declaration

I wish to transfer the assets of my Retirement Annuity Contract (RAC) to an approved Irish Life PRSA(s). I understand that Irish Life is required to obtain any information it regards as relevant from the Company, named above, in order to facilitate the transfer of RAC funds. I authorise that company to give Irish Life any relevant information required. I declare that the RAC from which the transfer is being made has been cancelled.

Please sign and date

Signature
(Contributor / Applicant named on this application form)

Date

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

Section 8 - To be completed if transfer is from existing PRSA product

Value of assets being transferred: €

1. Give name and address of original PRSA provider:

2. Is the transfer from an Additional Voluntary Contributions PRSA (AVC PRSA)? Yes No

Contributor Declaration

I wish to transfer the assets of my PRSA contract to an approved Irish Life PRSA(s). I understand that Irish Life is required to obtain any information it regards as relevant from the original PRSA provider in order to facilitate the transfer of PRSA assets. I authorise that provider to give Irish Life any relevant information required.

Please sign and date

Signature

(Contributor / Applicant named on this application form)

Date

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

If this is an AVC only please fill in the separate Additional Information if PRSA is being used for AVCs form.

Section 9 - To be completed if transfer is from a pension arrangement outside the Republic of Ireland.

Note: Irish Life PRSAs are not QROPS

1. Type of pension arrangement from which funds are being transferred (occupational pension, personal pension, other):

2. Country where that pension arrangement was contracted:

3. Value of assets being transferred:

€

4. Has the above scheme / contract been approved by the Regulator in that country as a pension arrangement? Yes No

5. Does the Regulator in that country allow this transfer out? Yes No

6. Does the scheme / contract allow this transfer out? Yes No

7. Has the Pension Adjustment Orders or similar order been issued on pension benefits being transferred into this PRSA? Yes No

If yes, please confirm if the amount being transferred relates to the member or to the non-member spouse. Further information may also be required on some transfers involving Pension Adjustment Orders. (A Pension Adjustment Order is an order that grants part of the member's pension to his / her spouse in the event of divorce or separation.)

8. Has the scheme / contract accepted a transfer from an Irish pension arrangement within the last year? Yes No

9. Name and address of the scheme/contract's trustee/administrator/custodian/manager/insurance company authorised to allow the transfer:

Name

Address

Name of contact person in BLOCK CAPITALS

Position

Trustee / Administrator Declaration

The contributor named on this application form wishes to transfer funds held under the approved pension arrangement named above to an approved Irish Life PRSA contract. I confirm that the information provided in Section 9 above is correct.

Signed By

(Name in Block capitals)

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

Please sign and date

Signature

authorised to sign for and on behalf of the scheme / administrator

Date

Email

Phone number

Overseas Transfers to PRSA

Contributor Declaration

Are you resident in Ireland for tax purposes? Yes No

Note: The Revenue Commissioners has stated that we cannot accept a transfer value from an Overseas Pension Scheme unless you are resident in the Republic of Ireland for tax purposes.

Which country were you resident in prior to becoming resident in the Republic of Ireland (for tax purposes)?

Date of ceasing to be resident in the country

I wish to transfer the assets of my overseas pension arrangement to an approved PRSA product with Irish Life Assurance plc. I am aware of the retirement options available under the Irish pension plan and understand that they may be different to those offered in the overseas pension arrangement. I am aware of the tax implications on drawing benefits under the Irish pension plan.

I agree to allow Irish Life Assurance plc obtain any information it regards as relevant from the trustee, administrator, custodian, manager or company named above, in order to facilitate the transfer. I authorise that trustee, administrator, custodian, manager or company to give Irish Life any relevant information required.

I am aware of the tax implications of drawing benefits under the Irish pension plan.

I declare that the answers to the above statements in Section 9 are correct.

Please sign and date

Signature

(Contributor / Applicant named on this application form)

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

Date

Please note that by transferring your pension to this PRSA your fund will fall under the Republic of Ireland thresholds for maximum pension funds and tax retirement lump sums. For more information please speak to your financial adviser.

