

Company Pension Transfer In Form

Before you give us your personal information it is important that you know what your data protections rights are and how and why your personal information is used. This is set out in our Irish Life Data Privacy Notice which is always available on our website at <https://www.irishlife.ie/privacy-notices/> or you can ask us for a copy. If you are a member of the Irish Life Retail Master Trust, the Trustee's Data Privacy Notice is also available at <http://www.irishlife.ie/retail-master-trust>.

Please read the Sections carefully before completing them and use BLOCK CAPITALS.

If any section is blank or illegible, this may result in a delay in processing your request.



This form must be completed for top ups into an existing Irish Life company pension schemes

1. Financial Adviser Details

Financial Adviser Name

Financial Adviser Code

Profile Number

If the transfer value is from an overseas pension please contact Irish Life for specific requirements. Irish Life cannot accept transfers from the UK or from pension schemes which have UK tax-relieved contributions as our pensions are not registered as QROPS with HM Revenue & Customs

2. Source of Transfer

Where is the transfer value coming from?

- A company pension scheme, including Master Trust, AVC scheme or self-administered scheme
- A Personal Retirement Bond (PRB) or Buy Out Bond (BOB)
- A Personal Retirement Savings Account (PRSA)
- A pension arrangement outside the State

3. Receiving Scheme and Member Details

a. Existing Irish Life plan number

b. Employer name:

c. Member Name

d. Current Schedule E Salary €

e. Current value of company pension scheme, AVC or PRSA AVC for this employment €

f. Current employer, employee and AVC contributions to any other company pension scheme, AVC or PRSA AVC for this employment € a year

Pensions from other employments

g. Current value of other pensions from other periods of employment and / or self-employment €

If you need more space or if the member has retirement benefits they have already received or a defined benefit scheme please provide details in the text box below or on a separate sheet.

Please include a recent payslip or Employment Detail Summary available from Revenue's online MyAccount as proof of salary

Questions (e) to (g) are to ensure your company pension benefits are within overall Revenue maximum limits.

4. Transferring Office / Scheme Details

Please include a recent payslip, P60 or a copy of your Employment Detail Summary pdf from Revenue's myAccount.

Questions 4.(b) to 4.(d) and 5.(a) are to ensure your company pension benefits are within overall Revenue maximum limits

(a) Name of transferring Life Office / trustees

(b) Transferring plan reference number

(c) Employer name

(d) Transfer value amount €

(e) Contact details

5. Investment Choice

If this information is not provided we will run the maximum funding check using the strict scale, however we may require further information before this top up can be processed.

Fund choice for transfer amount:

Invest in existing fund(s) choice

Or

Other fund (please state)

%

%

%

%

%

%

6. Member Declaration

- I wish to transfer the assets of my occupational pension / Buy Out Bond (or Personal Retirement Bond) / PRSA Plan / pension arrangement outside of the State to my existing Irish Life company pension plan identified in Section 3 above.
- I understand that Irish Life Assurance plc (Irish Life) is required to obtain any information it regards as relevant from the transferring trustees or company named above, in order to facilitate the transfer. I authorise the transferring trustees or company to give Irish Life any relevant information required.
- I understand the investment date of the transfer in will be based on the date on which Irish Life receives all necessary requirements.
- I understand the transfer in can only be invested where the receiving scheme is Revenue approved, or for transfers from an occupational pension / Buy Out Bond (or Personal Retirement Bond) that it meets all Revenue requirements and an application for approval has been submitted to Revenue for consideration.
- I declare that I have been provided with the necessary information to make an informed investment decision. I am happy with the investment choice made on this application form (or supplied through any additional documents linked to this application).

Please sign and date

Signature

Date (dd/mm/yyyy)

This declaration is also required for one-member schemes where individual trustees or corporate trustees have been appointed, other than Harmony Pension Trustees

7. Trustee Declaration on behalf of receiving pension scheme (required for one-member schemes where employer acts as trustee)

I / we the trustees of the occupational pension scheme for the plan set out in Section 3 above (receiving pension scheme) acknowledge the member's transfer request and confirm the receiving pension scheme can accept the transfer value.

Please sign and date

Signature

(Trustee authorised to sign on behalf of the scheme receiving the assets)

Name

Date (dd/mm/yyyy)