

# Topping up an existing pension policy

Pension Product	Requirements	Additional Info
<b>Personal Pension</b>	<ol style="list-style-type: none"><li>Written instruction from the client including:<ol style="list-style-type: none"><li>Clarification if single or regular premium</li><li>Confirmation of top up amount</li><li>Confirmation of fund choice</li></ol></li><li>Confirmation of commission choice</li></ol>	
<b>Company Pension</b>	<ol style="list-style-type: none"><li>Completed Company Pension Top Up Form, or</li><li>Written instruction from the employer including:<ul style="list-style-type: none"><li>Top up amount</li><li>Fund Choice</li></ul></li><li>Evidence of salary</li><li>Details of retained benefits</li><li>Confirmation of commission choice</li></ol>	<ul style="list-style-type: none"><li>Where DTS or ITS are trustee on the policy, fund choice can be confirmed by the employee</li><li>Remember to clarify the premium split between employee, employer and AVC</li><li>A revenue funding check will be processed in all cases</li></ul>
<b>PRSA PRSA AVC</b>	<ol style="list-style-type: none"><li>Completed PRSA Top Up Form, or</li><li>Written instruction from the client including:<ul style="list-style-type: none"><li>Clarification if it is a single or regular premium</li><li>Confirmation of top up amount</li><li>Confirmation of fund choice</li></ul></li><li>Confirmation of commission choice</li></ol>	<ul style="list-style-type: none"><li>If a regular premium top up is requested, a completed Payroll Deduction Authority form is required where premium is paid via salary deduction</li></ul>