Setting up a new pension policy

Pension Product	Requirements	Additional Info/Eligibility
Personal Pension	1. Fully completed Personal Pension Application Form	• Self employed with income taxed under Schedule D, Case 1 or Case 2, or • Employees who are not a member of their employers pension scheme

Company Pension	1. Fully completed Company Pension Application Form
	2. Evidence of salary by way of:
	    1. Payslip
	    2. Employment details summary pdf available from Revenue's online account
		• Employees must be in receipt of Schedule E income in order to effect a Company pension
		
		• The employer must pay a meaningful contribution to the scheme
		
		• A revenue funding check will be processed in all cases

PRSA	1. Fully completed PRSA Application Form If the PRSA is facilitated via salary deduction the following will also be required: 1. Payroll Deduction Authority Form 2. PRSA Employer Designation Form (where the employer is not already designated with Irish Life)	• Self employed with income taxed under Schedule D, Case 1 or Case 2, or • Employees who are not a member of their employers pension scheme

Irish Life

Setting up a new pension policy

Pension Product	Requirements	Additional Info/Eligibility
PRSA AVC	1. Fully completed PRSA Application Form - Ensure full completion of Section F and G Where the main scheme is a Defined Benefit arrangement, we will also require: - Copy of the members Pension Benefit Statement, or - DB details included on the application form, signed by the employer, HR department or client	Employees with Schedule E income, who are members of their employers' company pension scheme and want to make additional voluntary contributions
ARF/AMRF	1. Fully completed ARF/AMRF Application Form 2. Bank details for income payments (all cases) 3. For ARF's, evidence of eligibility	ARF Eligibility: - Guaranteed pension income in excess of €12,700 pa - Existing investment of €63,500 in an AMRF

Irish Life