

Exit Tax Rates

Single Payment

Multi Asset Portfolio 4 Series C 100 %

Total: 100%

Illustrative Growth Rates

Include Second Growth Rate Illustration

Maximum Main Illustration %

5.00

Exit Tax Rates

Exit Tax Rate

41%

41%

25%

0%

[Learn more](#)

Select the exit tax rate that applies based on the plan owner e.g.

- 41% for individuals
- 25% for corporate entities
- 0% for approved charities, pension schemes etc.

More information on exit tax rates can be found in the **learn more** link.

Exit Tax Rates

There are different rates of exit tax and how they apply to a plan is determined by the type of plan owner. See the following rates and when they may apply.

Rate	Plan Owner is
0%	A life assurance company; An investment undertaking; A Revenue approved charity; A PRSA provider; The court service; NAMA or where the plan is an asset held by the National Pensions Reserve Fund; A company pension scheme; An ARF or AMRF; The Motor Insurers' Bureau of Ireland <i>(this list also includes non-residents and Credit Unions but Irish Life are unable to transact business with these plan owner types)</i>
25%	A corporate entity
41%	All other plan owner types

Note: The exit tax rates quoted are for illustration only. Should your client apply for this product, the default exit tax rate that will be quoted on our online portals and on client communications is 41%.

Plan Owner Name

Exit Tax Rates

Exit Tax Rate

25%

[Learn more](#)

Plan Owner Name

ABC Ltd

[+ Profile & Other Details](#)

Where an exit tax rate of 25% or 0% is selected you will have the option to include the name of the plan owner.

This information will feed into the Your Details section of the client report.

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Finish

YOUR DETAILS

Joseph Bloggs

DATE OF BIRTH:
1 January 1980

Plan Owner: ABC Company Ltd

YOUR FINANCIAL ADVISER

Tester McTestFace

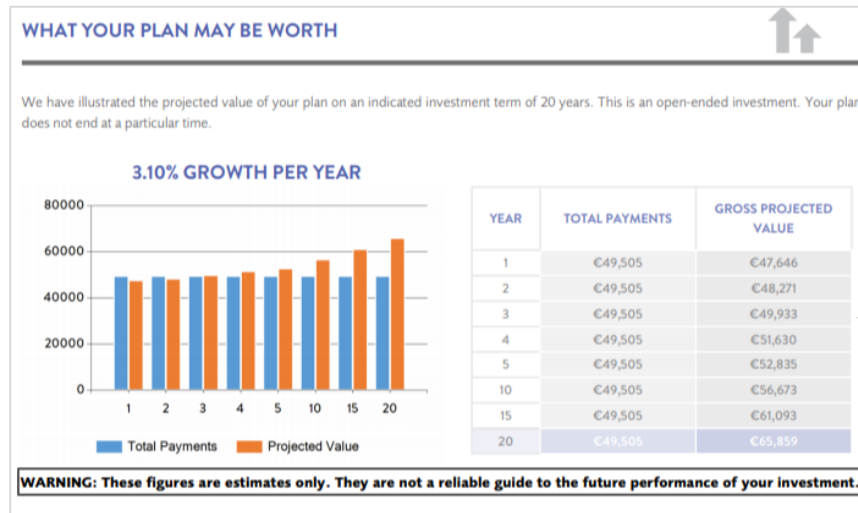
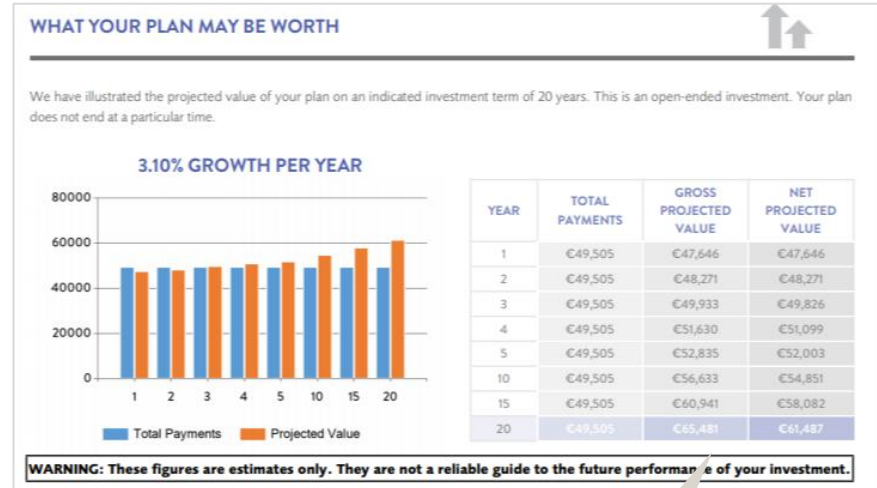
12345678
xx@xyz.com

Dynamic Reports

- Information on Taxation section changes in line with exit tax rate selected
- Plan Owner field appears for 25% and 0% exit tax rate
- Projected values displayed as gross and net amounts for 41% and 25% exit tax rates and as gross value for 0% rate.

Note:

The option to select an exit tax rate of 25% or 0% is only available on MyQuotes. Irish Life policy documentation and ongoing plan valuations will continue to show an exit tax rate of 41%.



Gross & Net projected values shown where 41% or 25% exit tax rate selected.

Gross projected value shown for 0% exit tax rate.