Self-Invested Fund

The Self-Invested Fund Team is a Pension Servicing Team that is dedicated to servicing all business for the Self-Invested Fund

Our aim is to provide you with a personal, friendly and efficient service. Our team of professional contacts will process all Self-Invested Fund new business, top-ups & switches and respond to all phone, post and email queries.

Designated contacts to look after all your Self-Invested Fund queries

Lorna O'Keeffe

Anne Cornally

Karen Tuke

Tina Duggan

Alan Bennett

Neil Candy

Telephone: 01-704-1831

Fax: 01-704-1988

This is a right-fax facility enabling you to fax directly to our email account with documentation that you might normally have posted.

Email:
selfinvestedteam@irishlife.ie

Postal Address:
Self-Invested Fund Team, Location 613, Irish Life Centre, Lower Abbey St., Dublin 1

OPENING HOURS:
Monday to Friday - 9am to 5pm

Aideen Geraghty
Team Manager
Self-Invested Fund

Email: aideen.geraghty@irishlife.ie
Telephone: 01 704 2629

James Waldron
Senior Manager
Self-Invested Fund

Email: james.waldron@irishlife.ie
Telephone: 01 856 3341

Stewart Taylor
Business Development Manager
Self-Invested Fund

Email: stewart.taylor@irishlife.ie
Telephone: 01 704 2768
Mobile: 087 9073721

Our service to you

Irish Life continues to invest heavily towards making it easier to do business using our online system 'bline'

www.bline.ie

At the touch of a button, you can access a wide range of information specifically for the Self-Invested Fund

Your Guide to the Self-Invested Fund: Complete guide to the Self-Invested Fund

Investment Instruction Forms: Forms required to buy, sell or switch in the Self-Invested Fund

Portfolio Valuation Statements/Trade Confirmations: Plan/Trade specific information – You can access this via the 'Valuation Report' button on Fund Details & Current Values page

Daily Deposit Rates: Most up to date deposit rates available

Execution-Only Service Information: User Guide, Frequently Asked Questions and 'White List' of funds that can be traded

You can also access...

Client Details: All client details are available including name, address, PPSN & the plan owner

Payment Details: Premium details and bank details and on term plans, the risk cost

Payment History: History of payments and top-ups added to the plan

Fund Switch: The system will inform you if there is a switch outstanding on the plan

Fund Details & Current Values: Self-Invested Fund Valuation statement is available here (as outlined above)

Business Retention & Persistency: This section contains information regarding your book of business – losses, persistency and related alerts on your customers' plans

Document Store: You can get copies of Annual Benefit Statements (ABS), Commission Statements, Encashment Letters, Plan Documents, Underwriting Special Terms Letters, Premium Billing Letters and many more....