



For Advisor Only

Invesco Investment Bond - Single & Joint Life

General :

A lump sum investment bond offering a wide range of investment options.

Proposal Submission to Irish Life :

The most efficient method of submitting Investment Bond business to Irish Life is via our online proposal system which is available at www.bline.ie :

- a) The online proposal system highlights which information is mandatory
- b) The 'Paper Compliance' screen displays all documentation required in order to progress the plan
- c) Client signature(s) can also be forwarded to Irish Life via E Scan at www.bline.ie

What happens when the plan is submitted to Irish Life :

Irish Life will review the details submitted and seek further information or clarification if required from Invesco. You can view any outstanding requirements on your My Biz link available at www.bline.ie

What we need to issue a plan :

We will always need:

- a) An online application
- b) A scanned client signature(s)
- c) A scanned Trust Form if the plan is to be issued in Trust
- d) Money laundering requirements e.g proof of address , photo id etc.
- e) The premium

How will I know when the plan is issued?

Because you are choosing Online for all communications, you will receive a text message or email confirming the plan has been issued and plan schedule has been uploaded to My Biz at www.bline.ie

The client's correspondence, including plan schedule, will be posted to My Online Services at www.myonelineservices.ie

Summary Plan Details

Client net allocation	100%
Entry charge	None
Early exit charge	None
Fund management charge	0.95% for indexed funds which includes default trail paid to Invesco. Funds with external manager element may have a higher charge - please refer to Key Features Flyer

Invesco Limited is regulated by the Central Bank of Ireland. An analysis of Invesco activities between those that are regulated by the Central Bank of Ireland and those that are not is set out in the company's website www.invesco.ie

Irish Life Assurance plc is regulated by the Central Bank of Ireland.



Plan charge

0.10%, 0.20%, 0.30%, 0.40% or 0.50% may be added

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