

Complete Solutions PRSA

Supplementary Application Form

This form is to be completed along with the regular Complete Solutions PRSA Application form if you are setting up more than one PRSA and where the details for each PRSA are different (for example fund choice and contribution amounts). Please attach both these forms when you are sending them to Irish Life. The maximum number of PRSAs you can take out using this supplementary application form is 9.

1. FINANCIAL ADVISER DETAILS

Financial adviser name

Financial adviser code

Please note: All PRSAs will be set up on the same profile(s) as stated in the main PRSA application form unless we are told otherwise.

2. PERSONAL DETAILS

Title (Mr/Mrs/Ms)First Name

Date of Birth

dd / mm / yyyy

Surname

		PRSA 2	PRSA 3	PRSA 4	PRSA 5
Proposal number		<div></div>	<div></div>	<div></div>	<div></div>
CS PRSA Standard (Please tick)		<div></div>	<div></div>	<div></div>	<div></div>
CS PRSA Options (Please tick)		<div></div>	<div></div>	<div></div>	<div></div>
Regular contributions	Employee	€ <div></div>	€ <div></div>	€ <div></div>	€ <div></div>
	Employer	€ <div></div>	€ <div></div>	€ <div></div>	€ <div></div>
On what date are your contributions to start?		<div>dd / mm / yyyy</div>	<div>dd / mm / yyyy</div>	<div>dd / mm / yyyy</div>	<div>dd / mm / yyyy</div>
How often do you wish to make contributions?	Monthly <div></div> Quarterly <div></div> Half Yearly <div></div> Yearly <div></div>	Monthly <div></div> Quarterly <div></div> Half Yearly <div></div> Yearly <div></div>	Monthly <div></div> Quarterly <div></div> Half Yearly <div></div> Yearly <div></div>	Monthly <div></div> Quarterly <div></div> Half Yearly <div></div> Yearly <div></div>	Monthly <div></div> Quarterly <div></div> Half Yearly <div></div> Yearly <div></div>
Do you want your contributions to increase in line with inflation? (indexation is not available for payroll deduction cases)	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>
Lump Sum Contribution	Employee	€ <div></div>	€ <div></div>	€ <div></div>	€ <div></div>
	Employer	€ <div></div>	€ <div></div>	€ <div></div>	€ <div></div>
Transfer value		€ <div></div>	€ <div></div>	€ <div></div>	€ <div></div>
Fund options: - you should refer to your main application and product booklet for an explanation of these terms					
1. Default Investment Strategy (Annuity)	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>
2. Default Investment Strategy (ARF)	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>
3. Annuity Lifestyle Option (insert fund choice in (5) below)	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>
4. ARF Lifestyle Option (insert fund choice in (5) below)	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>	Yes <div></div> No <div></div>
5. My fund choice:	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>
	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>
	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>

All regular and lump sum contributions/transfers will be invested as above. If you would like lump sum contributions/transfers to be invested differently than regular contributions, please indicate your fund choice below?

Fund name and %	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>
Fund name and %	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>
Fund name and %	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>
Fund name and %	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>	<div></div> % <div></div>

	PRSA 6	PRSA 7	PRSA 8	PRSA 9	PRSA 10
Proposal number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CS PRSA Standard (Please tick)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CS PRSA Options (Please tick)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regular contributions					
Employee	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Employer	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
On what date are your contributions to start?	<input type="text" value="dd / mm / yyyy"/>	<input type="text" value="dd / mm / yyyy"/>	<input type="text" value="dd / mm / yyyy"/>	<input type="text" value="dd / mm / yyyy"/>	<input type="text" value="dd / mm / yyyy"/>
How often do you wish to make contributions?	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/>	Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly <input type="checkbox"/>
Do you want your contributions to increase in line with inflation? (indexation is not available for payroll deduction cases)	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>
Lump Sum Contribution					
Employee	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Employer	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Transfer value	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

Fund options: - you should refer to your main application and product booklet for an explanation of these terms

1. Default Investment Strategy (Annuity)	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>
2. Default Investment Strategy (ARF)	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>
3. Annuity Lifestyle Option (insert fund choice in (5) below)	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>
4. ARF Lifestyle Option (insert fund choice in (5) below)	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>	Yes <input type="radio"/> No <input type="radio"/>
5. My fund choice:	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

All regular and lump sum contributions/transfers will be invested as above. If you would like lump sum contributions/transfers to be invested differently than regular contributions, please indicate your fund choice below?

Fund name and %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Fund name and %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Fund name and %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Fund name and %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Fund name and %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

3. DECLARATION

This supplementary application is linked to my main application. The signed declaration within that application applies to this form also.

Customer signature

Date

Lower Abbey Street
Dublin 1 Ireland
T: 01 704 2000
F: 01 704 1900



Irish Life