Irish Life

Single Premium Top up Form

For the most efficient application of funds to your customers pension plan, please ensure **ALL SECTIONS** are completed before submitting to our offices.

Financial Adviser Name

Financial Adviser Code

Commission Profile Number -

Customer Name

Plan Number

Top Up Details

Proposed Top Up Amount €

Contribution Detail

	Confirm %	or	Amount
Employer Contribution	%		€
Employee Contribution	%		€
AVC Contribution	%		€

Fund Choice

	Confirm %	or	Amount to be invested in each fund
	%		€
	%		€
	%		€
	%		€
	%		€

Advisor Declaration

I declare that the information outlined above accurately reflects the selected investment choice for the aforementioned customer. As the nominated financial advisor, I confirm that the submitted top up be applied in the manner as outlined above and in line with the requested fund choice and commission profile.

Please sign and date

Financial Advisor Signature: ✗

Date d d / m m / y y y y

Points to note:

Self-Invested Fund: If contributions are to be invested in Self Invested Funds, we will require a completed Investment Instruction Form. Please ensure this plan is eligible for the Self Investment Fund facility prior to submission.

Investment Strategy: If this plan is invested in an investment strategy such as Lifestyling or Default Investment Strategy (DIS), please be aware that selecting a specific fund for this investment may mean that the total fund is moved from the strategy. Contact your account manager for further information.

Existing Funds: If the existing fund choice is to be changed, we will require a separate and explicit instruction from the customer or trustee, where applicable, to do so. The above fund choice section is in respect of the top up amount only.

Effective Date: Funds will only be applied and invested with effect from the date of receipt of all requirements. It is important that you ensure this form is completed in full.

Confirmation Correspondence: Automated confirmation correspondence will issue the day after the top up has been applied to the plan. You can also check that the requested top up has been applied on www.bline.ie.

Company Pensions: Single Premium Top Ups to a Company Pension may require a maximum funding check. If so, we may need to contact you in this regard.

For further information please refer to BLine or your account manager. You can contact us with any queries or questions you may have at the following:

Phone:	01 704 1872
Fax:	01 242 2911
E-Mail:	pensionsnewbusiness@irishlife.ie
Post:	Pension New Business Irish Life Lower Abbey St Dublin 1

Irish Life