

Options Request – Occupational Pension Scheme

For the purposes of **retirement options only**, we will accept the following required information by email where possible. However you should be aware that any quotations provided are for illustration purposes only and that quotations made are subject to change based on the information provided and confirmed by the trustees on the eventual retirement claim form.

<u>Date of Joining Service</u>	- for options purposes, if this is not given we can use date of joining as per the proposal form
<u>Date of Leaving Service/Retirement</u>	<ul style="list-style-type: none">- this is the date of leaving service/retirement in relation to the employment associated with the plan- If the customer is still in employment (but over 60) we can use the date of the request as this date
<u>Final Salary</u>	<ul style="list-style-type: none">- If 0/5% director require highest salary in last 5 years prior to leaving service/retiring- If 20% director require 3 highest consecutive salaries in last 10 years prior to leaving service/retiring- Remember to confirm the year of salary, as we may be able to apply dynamisation.
<u>Confirmation of other pension benefits</u>	<ul style="list-style-type: none">- both claimed and in force- details of tax free lump sums drawn- details of annuity currently in payment- details of amounts invested in ARF/AMRF- Details of value and type of current in force pension plans- If other pension plans are company arrangements will require confirmation of employment they relate to
<u>If Irish Life Plan is an AVC</u>	- We will require details of the main scheme and how it is being claimed
<u>Pension Adjustment Order</u>	- Has a PAO or Notice to Trustees been granted or applied for in respect of this policy

At Retirement Claim stage, full claim requirements will still apply.