

Different Options

Reason for considering withdrawal	Available Options	What do I need to do
1. Specific need for money	Withdraw what you need and continue regular payments* *will depend on your plan type	Complete section A,B and C overleaf
2. Investment performance	You have the option to switch funds, most plans give a range of other fund options. These include lower risk options if you are looking for one.	You should speak with your Financial Adviser before you switch funds
3. My circumstances have changed	Reduce regular payment* Take a Payment Holiday* *will depend on your plan type	Confirm in writing Confirm duration of holiday in writing
4. Still undecided	Talk to your Financial Adviser or call our Customer Service Centre on 01 704 1010	

Withdrawal Requirements Checklist

1. I have enclosed a copy of my current Passport/Drivers Licence ☐
2. I have enclosed a copy of my Marriage Certificate if my surname has changed since starting the plan. ☐
3. The plan is assigned, I have enclosed a Deed of Release or Signed request from assignee (see note below) ☐
4. The plan is in trust, I have enclosed a Signed request from all trustees ☐

The quickest way to have your Withdrawal request dealt with is to fax this form directly to **01 242 2907**.
Alternatively, you can send this form to the address below.

Important Points to Note

1. Non-Resident Requirements

- Completed "Declaration of Residence outside Ireland" form. Please contact a member of our Customer Service team on 353 1 704 1010 for a copy of this form.
- A recent Utility bill from the last three months. This must be in both customer names if it's a joint life plan. Otherwise, we require a separate bill for each plan owner.

2. Assignments / Trusts

- Your plan may be assigned to a bank or other financial institution as loan security.
- If your plan is assigned we will require a Deed of Release or a signed request from the assignees confirming they are agreeable to this withdrawal request.
- If your plan is in trust we will require a signed request from all trustees confirming they are agreeable to this withdrawal request.

3. Joint Life Plans

- If your plan is in joint names, your payment will be issued in joint names unless you give us different written instructions.

4. Plan Benefits

- If you withdraw savings from a plan which gives you protection benefits, such as life or specified illness cover, your protection benefits will go down (for a joint/dual life plan, your benefits will go down for both lives covered). The reduction will depend on the value remaining in the plan, your current age, your current payment amounts and the level of cover you currently have.

5. Plan Value

- The value of your plan will be based on the date we receive all completed documents.



Irish Life

Irish Life, Lower Abbey Street, Dublin 1, Ireland

Telephone: 01 704 1010 Fax: 01 242 2907 Web: www.irishlife.ie Email: customerservice@irishlife.ie