



For Advisor Only

Invesco ARF and AMRF

Eligibility :

An Approved Minimum Retirement Fund and / or an Approved Retirement Fund may be an option for members of Company Pension Schemes, Personal Pensions, PRSAs and AVCs subject to certain conditions.

It is also permitted to transfer the proceeds from an existing A(M)RF to another A(M)RF

Proposal Submission to Irish Life:

The most efficient method of submitting A(M)RF 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 and will also validate certain information submitted e.g PPSN details
- 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) An Investment Instruction Form where the Self-Invested Fund is the chosen investment option
- d) A Source Of Investment Certificate for each payment - where the proceeds are from an Irish Life Retail plan Irish Life will complete this
- e) Documentary evidence of eligibility for an Approved Retirement Fund i.e evidence of guaranteed pension income , evidence of annuity or AMRF , evidence of age if over 75 years old
- f) The premium - if the premium is coming from another Life Office please ensure all claim requirements have been forwarded to them with an instruction to pay the money to Irish Life

A transferring Life Office may request a 'Willing & Able' letter before forwarding the premium to Irish Life. We will issue such letters upon request.

How will I know when the plan is issued ?

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.



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.myonlineservices.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
Plan charge	0.10%, 0.20%, 0.30%, 0.40% or 0.50% may be added

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