

PRB

Choose
PlanApply
NowSign
Now

Submit

Plan types

Choose plan

Please choose one of the options below that meets your customer's needs

Protection

☐

Savings

☐

Pension

☒

Investments

☐

Mortgage Protection

☐**Please select type of pension**

AMRF

☐

ARF

☐

Company

☐

PRSA & Personal & PRB

☒

PRSA AVC

☐

SAPS

☐**Please select subtype of pension**

PRSA Standard

☐

PRSA Non-Standard

☐

Personal Pension Plan

☒

Pension Life Cover

☐**Will you be paying regular premiums?**

Yes, Regular Premiums

☐

No, Single Premium Only

☒**Please select payment type****Select****Select****Select****Select**

Choose
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✔ Plan types

Choose plan



Irish Life

Select a plan *

| Plan | Description | Choose |
|---|--|----------------------------------|
| Complete Solutions bond for personal pensions | Complete Solutions bond for personal pensions - remote | <input type="radio"/> |
| Complete Solutions bond for personal pensions | No description available | <input type="radio"/> |
| Complete Solutions bond for personal pensions 1 | Complete Solutions bond for personal pensions 1 (Remote) | <input type="radio"/> |
| Invesco PRB | PRB | <input checked="" type="radio"/> |

Select**Then click next to
continue**

NEXT ▶

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Choose
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HOME

EXIT WITHOUT SAVING

EXIT, SAVE

**Complete all sections
marked with *** **Personal Details**

Contact Details

Employer Details

Benefit Details

Premium Details

Fund Details

Administration
Details

Revenue Details

Commission Details

**Invesco PRB**

Title

First Life

*

First name

*

Initial

Surname

*

Date of birth

*

Age Next Birthday

*

Gender

* ☒ Male ☐ Female

Marital status

*

Country of nationality

*

Previous surname (if any)

PPSN number

*

Are you Irish Resident for Tax?

* ☒ Yes ☐ No**Then click next to continue****NEXT**

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Irish Life

Invesco PRB

Address line 1

Patrick Murphy

* Main Street

Address line 2

Address line 3

County

* Dublin 1

Home phone number

0184111111

Mobile phone number

0871111111

Email address

pmurphy@eircom.net

How would the client like to receive their
communications from us? (welcome pack, letters
and regular statements)* ☒ Online@Irishlife.ie
☐ by paper post

Please confirm date of birth

* 10/01/1960

Then click next to continue**NEXT**

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Irish Life

Invesco PRB

Transferring scheme details: Date employment began



* 04/04/1982

Transferring scheme details: Date scheme service/employment ended

* 01/03/2002

Have you on your own, or with your spouse and/or minor children,
directly or indirectly owned or controlled more than 5% or more than 20%
of the voting rights of the employer?

* Yes over 20%

Highest 3 year consecutive salary in past 10 years - Year 1

* 50000

Year 2

* 50000

Year 3

* 50000

What is the source of this payment?

* Existing PRB

NEXT **Then click next to continue**

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Irish Life

Invesco PRB

Scheme Normal retirement age

Patrick Murphy

* 70

Do the rules of the scheme allow the
member/customer to avail of ARF/ARMF options?* ☒ Yes ☐ No

Name of Trustees for this PRB

* ABC Trustees

Name of Employer to whom PRB relates

* ABC Ltd

Is there a pension adjustment order granted against
this contribution?* ☐ Yes ☒ NoDoes any of this single contribution relate to more
than one previous pension scheme?* ☐ Yes ☒ No**Complete all sections
marked with ***

NEXT

Then click next to continue

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Plan **Apply
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**Complete all sections
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Fund Details

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Details

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**Invesco PRB**

Name of life office

* XYZ Life Co

Value of employer contributions

* 200000

Value of employee contributions

* 100000

Value of AVC contributions

* 0

How will this premium be paid?

* 3rd Party Cheque (Company)

Encashed policy number

NEXT **Then click next to continue**

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- ✓ Personal Details
- ✓ Contact Details
- ✓ Employer Details
- ✓ Benefit Details
- ✓ Premium Details

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Invesco PRB

Please select your single premium funds

| Fund | Percentage |
|--------------------------------|------------|
| * Indexed Commodities Fund | * 50 |
| Indexed Euro Corporate Bond Fu | 50 |



NEXT ▶

Select Fund/s

Select
percentage

To add fund simply click plus – to
delete fund just click minus

Then click next to
continue

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Complete all sections
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Irish Life

Invesco PRB

Name of pension scheme

* XXXYYZZ

Revenue Reference Number

* 218889

Pension Board Registration Number

Have the Trustees split the contribution so that part of it is going to another PRB?

* ☐ Yes ☒ No

Is the PRB to pay for a retirement lump sum?

* ☒ Yes ☐ No

Is spouses/civil partners pension after death to be provided?

* ☐ Yes ☒ No

Does the member/customer have any pension benefits from current or previous employment?

* ☐ Yes ☒ No

Please give details

Has the member/customer received any pension benefits on leaving any employment?

* ☐ Yes ☒ No

Please give details

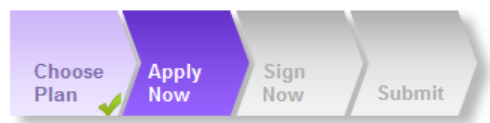
Then click next to continue


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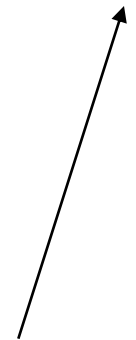
- ✓ Personal Details
 - ✓ Contact Details
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 - ✓ Benefit Details
 - ✓ Premium Details
 - ✓ Fund Details
 - ✓ Administration Details
 - ✓ Revenue Details
 - Commission Details**
- 
- Irish Life

Invesco PRB

+ Please Choose your Single Premium Commission Options

View Commission

NEXT ▶



Click to select commission options

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Choose
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**Invesco PRB****— Please Choose your Single Premium Commission Options**Search:

| Detail | Trail | Profile Number | Choose |
|---|-------|----------------|----------------------------------|
| 0.5% Trail with 0% plan charge [6280] | 0.50% | 6280 | <input checked="" type="radio"/> |
| 0.6% Trail with 0.1% plan charge [6282] | 0.60% | 6282 | <input type="radio"/> |
| 0.7% Trail with 0.2% plan charge [6285] | 0.70% | 6285 | <input type="radio"/> |
| 0.8% Trail with 0.3% plan charge [6287] | 0.80% | 6287 | <input type="radio"/> |
| 0.9% Trail with 0.4% plan charge [6290] | 0.90% | 6290 | <input type="radio"/> |
| 1.0% Trail with 0.5% plan charge [6292] | 1% | 6292 | <input type="radio"/> |
| 0.4% Trail with 0.1% rebate [6294] | 0.40% | 6294 | <input type="radio"/> |
| 0.3% Trail with 0.2% rebate [6296] | 0.30% | 6296 | <input type="radio"/> |

Showing 1 to 8 of 8 entries

View Commission

NEXT ▶

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Step 2 – view commission

Step 1 - Select commission option/profile

View Commission



View Commissions

| Year | Premiums | Commission |
|------|----------|------------|
| 1 | €300,000 | €1,525 |
| 2 | €0 | €1,579 |
| 3 | €0 | €1,634 |
| 4 | €0 | €1,701 |
| 5 | €0 | €1,772 |
| 6 | €0 | €1,846 |
| 7 | €0 | €1,922 |
| 8 | €0 | €2,002 |
| 9 | €0 | €2,085 |
| 10 | €0 | €2,172 |

Showing 1 to 10 of 18 entries



Annual fund management charge based on current fund choice

01.050%

Year 1 Regular Premium Commission

€0

Year 1 Single Premium Commission

€1,525

I confirm that the commissions payable are correct.



**Tick box to confirm commission
and then click save**

SAVE

CANCEL

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Choose
Plan

Apply
Now

Sign
Now

Submit

Invesco PRB

+ Please Choose your Single Premium Commission Options

View Commission

NEXT ▶

Click next to continue

- ✔ Personal Details
- ✔ Contact Details
- ✔ Employer Details
- ✔ Benefit Details
- ✔ Premium Details
- ✔ Fund Details
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- ✔ Commission Details



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Choose
Plan Apply
Now Sign
Now

Submit

**Complete all sections
marked with ***

Paper compliance

Invesco PRB

Please confirm that you have completed the documents set out below

- * ☒ Evidence of salary required : P60 or Accountant's report
- * ☒ Section 30 receipt given to the customer.
- * ☒ On-Line Application Declaration in the Pensions Booklet signed and dated by the customer.
- * ☒ Customer Information Notice given to the customer

NEXT ►

When all sections complete then click next

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[HOME](#)[EXIT WITHOUT SAVING](#)[EXIT, SAVE](#)Choose
Plan ✓Apply
Now ✓Sign
Now ✓

Submit

Thank you

Invesco PRB

Thank you for your application.

[Preview Report](#)

Click if you wish to review input

[Submit Plan](#)

Click to submit plan



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Choose Plan

Submit

Invesco PR

Thank you for y

Preview Re

Submit Plan

Submit Complete

OK

Thank you



Click ok to continue

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Choose
Plan ✓Apply
Now ✓Sign
Now ✓

Submit

✓ Thank you

Invesco PRB

Thank you for your application.

Submit Complete. Your plan number is 11043855

[View Report](#)[Another Proposal For This Client](#)[Done](#)

Click if you wish to submit
another plan for client or just
press Done if complete



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