

Personal Investment

Choose
PlanApply
NowSign
Now

Submit

Plan types

Choose plan



Irish Life

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

Protection

☐

Savings

☐

Pension

☐

Investments

☒

Mortgage Protection

☐

Number of people

☒ One ☐ Two

Select

Select

NEXT ▶

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Choose
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✔ Plan types

Choose plan



Irish Life

Select a plan *

Plan	Description	Choose
Dual Return Bond 2	No description available	<input type="radio"/>
Invesco Personal Investment	Investment Bond	<input checked="" type="radio"/>

NEXT ▶

Select and then click next

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Choose
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HOME

EXIT WITHOUT SAVING

EXIT, SAVE

Personal Details

Contact Details

Plan Owner Details

Premium Details

Money Laundering
Details

Fund Details

Administration
Details

Commission Details



Irish Life

Invesco Personal Investment

Title

First name

Initial

Surname

Date of birth

Age Next Birthday

Gender

Marital status

Country of nationality

Previous surname (if any)

Occupation

Are you Irish Resident for Tax?

First Life

* Mr

* Patrick

* Murphy

* 10/01/1950

* 63

* ☒ Male ☐ Female

Married

* Ireland

* Electrical Contractor

* ☒ Yes ☐ No**Complete all sections
marked with *****Then click next**

NEXT ►

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Irish Life

Invesco Personal Investment

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

patrickmurphy@eircom.net

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

Please confirm date of birth

* 10/01/1950

Then click next to continue**NEXT**

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Choose
PlanApply
NowSign
Now

Submit

Invesco Personal Investment

Plan owner

Patrick Murphy

CHANGE OWNER (PERSONAL)

CHANGE OWNER (BUSINESS)

Trustee

None

ADD TRUSTEE INFO

NEXT ▶

Select alternative plan owner or just press next to continue

- ✓ Personal Details
- ✓ Contact Details
- Plan Owner Details**
- Premium Details
- Money Laundering Details
- Fund Details
- Administration Details
- Commission Details



Irish Life

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**Complete all sections
marked with ***

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**Invesco Personal Investment**

Client Lump Sum

* 250000

Is this amount inclusive of the
government levy?* ☒ Yes ☐ No

Investment Amount

€247,524.75

Government Levy Amount

€2,475.25

Total Amount Due

€250,000.00

How will this premium be paid?

* Personal Cheque from proposer(s) bank account

Name of third party cheque account
holderpermanent tsb bank account
numberDoes this payment come from your
personal bank account?☐ Yes ☒ No

Encashed or matured plan number

Bank Details

Bank sort code

* 900519

Bank account number

* 12345678

Name of account holder

* Patrick Murphy

Then click next to continue**NEXT**

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Plan Apply
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**Complete all sections
marked with ***

- Personal Details
- Contact Details
- Plan Owner Details
- Premium Details

 **Money Laundering
Details**

Fund Details

Administration
Details

Commission Details

**Invesco Personal Investment****Please indicate the sources of this money**

Salary, bonus or regular savings

* ☐ Yes ☒ No

Early retirement or redundancy payment

* ☐ Yes ☒ No

Proceeds from the sale of investments (including proceeds from life assurance plans) or other assets

* ☐ Yes ☒ No

Inheritance

* ☐ Yes ☒ No

Windfall/compensation payments

* ☐ Yes ☒ No

Other

* ☒ Yes ☐ No

Please describe

*

Have you obtained identification details for this customer(s) previously?

* ☐ Yes ☒ No

Please insert the plan number under which the details were recorded

Are you taking out this plan on your own behalf and for your own benefit?
If not, please fill in the following details:* ☒ Yes ☐ No

Name of other party

Relationship or other connection to you (if any)

Then click next to continue**NEXT ▶**

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Choose
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Submit

Invesco Personal Investment**Please select your single premium funds**

Fund	Amount
* Indexed Emerging Market Equity	* 147524.75
Indexed Japanese Equity Fund	100000

Regular withdrawal

None

Click regular withdrawal to add regular withdrawal details

REGULAR WITHDRAWAL

NEXT ▶

- ✓ Personal Details
- ✓ Contact Details
- ✓ Plan Owner Details
- ✓ Premium Details
- ✓ Money Laundering Details
- Fund Details**
- Administration Details
- Commission Details

Step 1
Select Fund/s**Step 2**
Select amount**Step 3**
To add a fund
press plus and
to subtract press
minus**Step 4**
Select if required
and complete
all sections**Then click next
to continue**

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**Select all sections
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**Invesco Personal Investment**

Please confirm whether or not this plan replaces in whole or in part any existing plans with Irish Life or any other insurer which have been, or are to be, cancelled or reduced

- * ☐ Yes, replacing Irish Life plans only
- ☐ Yes, replacing Irish Life plans and plans from another Life company
- ☐ Yes, replacing plans from another Life company
- ☒ No

Are you replacing a savings or investment plan?

☐ Yes ☐ No

Are you replacing a protection plan?

☐ Yes ☐ No

Are you replacing an income protection plan?

☐ Yes ☐ No

Would you like to sign this application electronically?

* ☐ Yes ☒ No

Then select next to continue**NEXT**

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Choose
Plan Apply
NowSign
Now

Submit

Invesco Personal Investment**+ Please Choose your Single Premium Commission Options**[View Commission](#)[NEXT ▶](#)

- ✓ Personal Details
- ✓ Contact Details
- ✓ Plan Owner Details
- ✓ Premium Details
- ✓ Money Laundering Details
- ✓ Fund Details
- ✓ Administration Details

Commission Details**Irish Life****Click to select commission options**

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Choose
PlanApply
NowSign
Now

Submit

- ✓ Personal Details
- ✓ Contact Details
- ✓ Plan Owner Details
- ✓ Premium Details
- ✓ Money Laundering Details
- ✓ Fund Details
- ✓ Administration Details

Commission Details

**Invesco Personal Investment****— 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	€247,525	€1,271
2	€0	€1,334
3	€0	€1,401
4	€0	€1,471
5	€0	€1,545
6	€0	€1,622
7	€0	€1,703
8	€0	€1,772
9	€0	€1,677
10	€0	€1,761

Showing 1 to 10 of 20 entries



Annual fund management charge based on current fund choice

00.950%

Year 1 Regular Premium Commission

€0

Year 1 Single Premium Commission

€1,271

I confirm that the commissions payable are correct.



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

SAVE

CANCEL

Irish Life

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Choose
PlanApply
NowSign
Now

Submit

Invesco Personal Investment**+ Please Choose your Single Premium Commission Options**[View Commission](#)[NEXT ▶](#)

- ✓ Personal Details
- ✓ Contact Details
- ✓ Plan Owner Details
- ✓ Premium Details
- ✓ Money Laundering Details
- ✓ Fund Details
- ✓ Administration Details
- ✓ **Commission Details**

**Irish Life****Click next to continue**

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Choose
PlanApply
NowSign
Now

Submit

Invesco Personal Investment

Please confirm that you have satisfied the requirements below

- * ☒ Money Laundering Customer Identification requirements met
- * ☒ On-Line Application Declaration in the Investments Booklet signed and dated by the customer.
- * ☒ Section 30 receipt given to the customer.
- * ☒ Business Replacement Declaration completed by you.
- * ☒ Customer Information Notice given to the customer
- * ☒ Cheque/Monies received

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 Personal Investment

Thank you for your application.

[Preview Report](#)

Click if you wish to review input

[Submit Plan](#)

Click to submit plan



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Thank you



Irish Life

Choose
Plan

Invesco Pe

Thank you for y

Preview Re

Submit Plan

Submit

Submit Complete

OK

Click ok to continue

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Choose
Plan ✓Apply
Now ✓Sign
Now ✓

Submit

✓ Thank you

Invesco Personal Investment

Thank you for your application.

Submit Complete. Your plan number is 11044312

[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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