

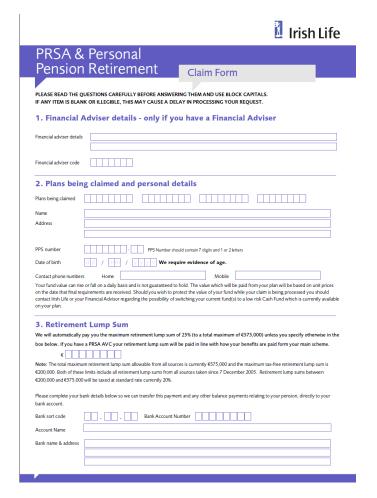
Buy Out Bonds / PRBs Submission Requirements

Annuity Route



- Send to Pension Claims if funds are coming from an IL Retail Plan
 - Personal & PRSA Retirement Claim form
 - Annuity Application form
 - A P60 or accountant's letter is required if the member was a proprietary director within the last 3 years of service
 - Evidence of age original or legible certified copy of the member's birth cert or passport
 - Marriage Cert if applicable
- WWW.bline.ie/pensions/retirement-claims-information

Claim Form (Key requirements)



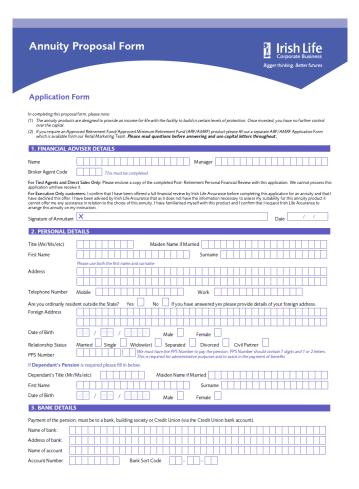


Evidence of Age

Marriage Cert if applicable

P60s if not already on file

Annuity App Form (Key requirements)





Evidence of Age

Marriage Cert if applicable

Quote if applicable (rates Are guaranteed for 14 days Copy of the quote required

Signed & Dated

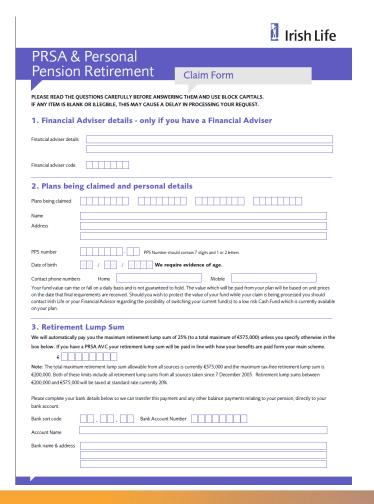
Commission – if non Standard. Default is 2%.

A(M)RF Route



- Send to Pension Claims if funds coming from an IL retail plan
 - Personal & PRSA Retirement Claim form
 - A(M)RF application form
 - A P60 or accountant's letter is required if the member was a proprietary director within the last 3 years of service
 - Evidence of age original or legible certified copy of the member's birth cert or passport
 - Proof, by pay or remittance slip, of guaranteed pension income, where this income is greater than €12,700 p.a
- WWW.bline.ie/pensions/retirement-claims-information

Claim Form (Key requirements)





Evidence of Age

Marriage Cert if applicable

P60s if not already on file

A(M)RF Form (Key requirements)



ARF/AN	nrf 🗓 Irish Life
Application	Form - Brokerage
ARF/AMRF products a fund. However, depen will last for your lifetime PLEASE READ THE C	reposal form please note: re designed to allow you to control your pension fund and you can determine the rate at which you take withdrawals from the ding on the investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund e. Before completing this application from please ensure you have read and understood the product booklet. DUESTIONS CAREFULLY BEFORE ANSWERING THEM AND USE BLOCK CAPITALS. NK OR ILLEGIBLE, THIS WILL CAUSE A DELAY IN PROCESSING YOUR APPLICATION.
1. FINANCIAL AD	OVISER DETAILS
Financial adviser name	
Financial adviser code	
2. PROFILE NUM	BER
Lump sum	- If this section is left blank this will delay us processing your application.
3. PERSONAL DE	TAILS
Title (Mr/Mrs/Ms)	First Name
Initial (if applicable)	Surname
	Previous Surname (if any)
Home address	
Country of residence Date of Birth	
	Single Married Separated Divorced Widowed Registered Civil Partner
Relationship Status E-mail address (if appli	
Contact Phone Numbe	
PPS Number	PPS Number should contain 7 digits and 1 or 2 letters
Occupation you are ret	iring from
Current occupation	
4. CONTRIBUTIO	N DETAILS
	of Investment Certificate (available at www.bline.ie) must be completed by the Insurance Company, QFM, PRSA
) transferring the money. Please submit a Source of investment Certificate for completion direct to the relevant with their completed claim documentation.
	Total Fund €
	Retirement lump sum €
Complete Solutions AA	MRF 1 € Complete Solutions AMRF 2 €

Commission Profile

Product Choice

Eligibility Evidence if ARF

IIF if SIF

Signed & Dated

Source of Inv Cert if funds coming from a non IL Retail Plan.



