

# PRSAs Submission Requirements

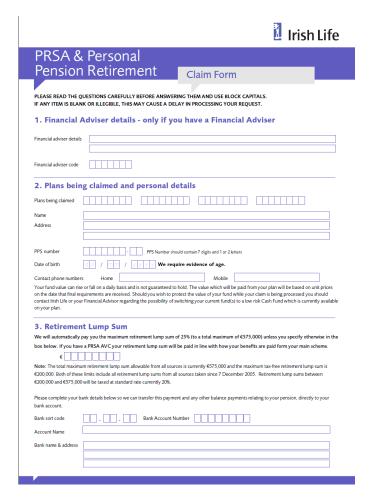
July 2013

#### **Annuity Route**



- Send to Pension Claims if funds are being claimed from an Irish Life
   Retail Plan
  - Personal & PRSA Retirement Claim form
  - Annuity Application form
  - Evidence of age original or legible certified copy of the member's birth cert or passport
  - Marriage Certificate if applicable
- WWW.bline.ie/pensions/retirement-claims-information

### Claim Form (Key requirements)





**Evidence of Age** 

**Marriage Cert if applicable** 

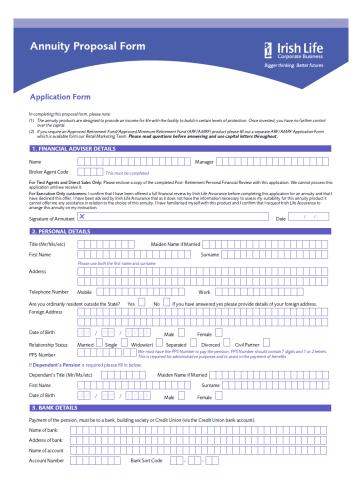
**Option Chosen** 

Bank Details for payment of lump sum

Full details of other pension Benefits – in-force & previously drawn down

Signed & Dated

#### 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

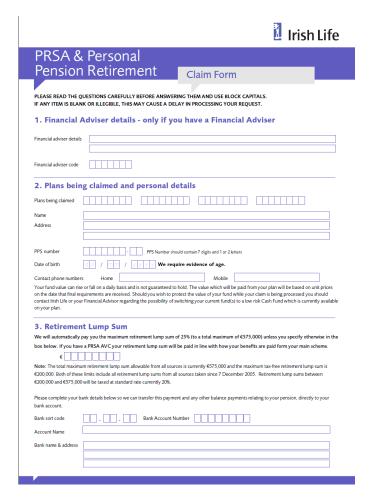
Commission – if non Standard. Default is 2%.

#### A(M)RF Route



- Send to Pension Claims if funds are being claimed from an Irish Life
   Retail Plan
  - Personal & PRSA Retirement Claim form
  - A(M)RF application form
  - 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
- Note: a client can leave the remaining fund in the PRSA and it will be treated similarly to an ARF or AMRF. If this option is selected then the ARF proposal is not required. Funds in a Vested PRSA can not be used for Eligibility for an ARF.

### Claim Form (Key requirements)





**Evidence of Age** 

**Marriage Cert if applicable** 

**Option Chosen** 

Bank Details for payment of lump sum

Full details of other pension Benefits – in-force & previously drawn down

Signed & Dated

## A(M)RF Form (Key requirements)



ARF/AN	arf 🗓 Irish Life	e
Application Form - Brokerage		
ARF/AMRF products a fund. However, depen will last for your lifetim PLEASE READ THE (	proposal form please note: are designed to allow you to control your pension fund and you can determine the rate at which you take withdrawals from the anding on the investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund and go rate investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund and go the investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund QUESTIONS CAREFULLY BEFORE ANSWERING THEM AND USE BLOCK CAPITALS.  NK OR ILLEGIBLE, THIS WILL CAUSE A DELAY IN PROCESSING YOUR APPLICATION.	
1. FINANCIAL AL	DVISER DETAILS	
Financial adviser name		
Financial adviser code		
2. PROFILE NUM	IBER	
Lump sum	If this section is left blank this will delay us processing your application.	
3. PERSONAL DE		
Title (Mr/Mrs/Ms)	First Name	
Initial (if applicable)	Surname	
	Previous Surname (if any)	
Home address		
Country of residence		
Date of Birth	Male Female	
Relationship Status	Single Married Separated Divorced Widowed Registered Civil Partner	
E-mail address (if appli		
Contact Phone Numbe PPS Number	ers Home Mobile  PPS Number should contain 7 digits and 1 or 2 letters	
Occupation you are ref	etiring from	
Current occupation		
4. CONTRIBUTIO	ON DETAILS	
In ALL cases a Source	e of Investment Certificate (available at www.bline.ie) must be completed by the Insurance Company, QFM, PRSA	
	s) 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 Al	MRF 1 € Complete Solutions AMRF 2 €	
Complete Solutions Ar	RF1 € Complete Solutions ARF2 €	

**Commission Profile** 

**Product Choice** 

**Eligibility Evidence if ARF** 

IIF form if investing in SIF

Signed & Dated

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

