



Irish Life

PRSAs Submission Requirements

July 2013

Annuity Route



Irish Life


- 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)



Irish Life

 Irish Life

PRSA & Personal Pension Retirement

Claim Form

PLEASE READ THE QUESTIONS CAREFULLY BEFORE ANSWERING THEM AND USE BLOCK CAPITALS.
IF ANY ITEM IS BLANK OR ILLEGIBLE, THIS MAY CAUSE A DELAY IN PROCESSING YOUR REQUEST.

1. Financial Adviser details - only if you have a Financial Adviser

Financial adviser details

Financial adviser code

2. Plans being claimed and personal details

Plans being claimed

Name

Address

PPS number PPS Number should contain 7 digits and 1 or 2 letters

Date of birth / / **We require evidence of age.**

Contact phone numbers Home Mobile

Your fund value can rise or fall on a daily basis and is not guaranteed to hold. The value which will be paid from your plan will be based on unit prices on the date that final requirements are received. Should you wish to protect the value of your fund while your claim is being processed you should contact Irish Life or your Financial Adviser regarding the possibility of switching your current fund(s) to a low risk Cash Fund which is currently available on your plan.

3. Retirement Lump Sum

We will automatically pay you the maximum retirement lump sum of 25% (to a total maximum of €575,000) unless you specify otherwise in the box below. If you have a PRSA AVC your retirement lump sum will be paid in line with how your benefits are paid from your main scheme.

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Note: The total maximum retirement lump sum allowable from all sources is currently €575,000 and the maximum tax-free retirement lump sum is €200,000. Both of these limits include all retirement lump sums from all sources taken since 7 December 2005. Retirement lump sums between €200,000 and €575,000 will be taxed at standard rate currently 20%.

Please complete your bank details below so we can transfer this payment and any other balance payments relating to your pension, directly to your bank account.

Bank sort code - - Bank Account Number

Account Name

Bank name & address

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)



Irish Life

Annuity Proposal Form



Application Form

In completing this proposal form, please note:

- (1) The annuity products are designed to provide an income for life with the facility to build in certain levels of protection. Once invested, you have no further control over the capital.
- (2) If you require an Approved Retirement Fund/Approved Minimum Retirement Fund (ARF/AMRF) product please fill out a separate ARF/AMRF Application Form which is available from our Retail Marketing Team. Please read questions before answering and use capital letters throughout.

1. FINANCIAL ADVISER DETAILS

Name Manager

Broker Agent Code This must be completed

For Tied Agents and Direct Sales Only: Please enclose a copy of the completed Post-Retirement Personal Financial Review with this application. We cannot process this application until we receive it.

For Execution Only customers: I confirm that I have been offered a full financial review by Irish Life Assurance before completing this application for an annuity and that I have declined this offer. I have been advised by Irish Life Assurance that as it does not have the information necessary to assess my suitability for this annuity product it cannot offer me any assistance in relation to the choice of this annuity. I have familiarised myself with this product and I confirm that I request Irish Life Assurance to arrange this annuity on my instruction.

Signature of Annuitant ☒ Date / /

2. PERSONAL DETAILS

Title (Mr/Ms/etc) Maiden Name if Married

First Name Surname

Please use both the first name and surname

Address

Telephone Number Mobile Work

Are you ordinarily resident outside the State? Yes ☐ No ☐ If you have answered yes please provide details of your foreign address.

Foreign Address

Date of Birth / / Male ☐ Female ☐

Relationship Status Married ☐ Single ☐ Widower ☐ Separated ☐ Divorced ☐ Civil Partner ☐

PPS Number This is required for administrative purposes and to assist in the payment of benefits.

If Dependant's Pension is required please fill in below.

Dependant's Title (Mr/Ms/etc) Maiden Name if Married

First Name Surname

Date of Birth / / Male ☐ Female ☐

3. BANK DETAILS

Payment of the pension, must be to a bank, building society or Credit Union (via the Credit Union bank account).

Name of bank:

Address of bank:

Name of account:

Account Number Bank Sort Code - -

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



Irish Life


- 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.blinc.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)



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PRSA & Personal Pension Retirement

Claim Form

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Financial adviser details

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2. Plans being claimed and personal details

Plans being claimed

Name

Address

PPS number PPS Number should contain 7 digits and 1 or 2 letters

Date of birth / / **We require evidence of age.**

Contact phone numbers Home Mobile

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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)



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ARF/AMRF
Application Form - Brokerage

In completing this proposal form please note:
ARF/AMRF products are designed to allow you to control your pension fund and you can determine the rate at which you take withdrawals from the fund. However, depending on the investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund will last for your lifetime. Before completing this application form please ensure you have read and understood the product booklet.
PLEASE READ THE QUESTIONS CAREFULLY BEFORE ANSWERING THEM AND USE BLOCK CAPITALS.
IF ANY ITEM IS BLANK OR ILLEGIBLE, THIS WILL CAUSE A DELAY IN PROCESSING YOUR APPLICATION.

1. FINANCIAL ADVISER DETAILS

Financial adviser name
Financial adviser code

2. PROFILE NUMBER

Lump sum - If this section is left blank this will delay us processing your application.

3. PERSONAL DETAILS

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 applicable)
Contact Phone Numbers Home Mobile
PPS Number - PPS Number should contain 7 digits and 1 or 2 letters
Occupation you are retiring from
Current occupation

4. CONTRIBUTION DETAILS

In ALL cases a Source of Investment Certificate (available at www.blinc.ie) must be completed by the Insurance Company, QFM, PRSA provider or Trustee(s) transferring the money. Please submit a Source of Investment Certificate for completion direct to the relevant institution, together with their completed claim documentation.

Total Fund €
Retirement lump sum €
Complete Solutions AMRF 1 € Complete Solutions AMRF 2 €
Complete Solutions ARF 1 € Complete Solutions ARF 2 €

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.



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