

Complete Solutions

Personal Retirement Savings Account for AVCs (PRSA AVC)

Supplementary Declaration linked with main PRSA AVC application form:

Please submit with main PRSA AVC application form.

Current Pension Scheme Details – Defined Benefit Occupational Pension Scheme

PRSA contributor name: _____ PRSA contributor date of birth: _____

Declaration (PRSA Contributor):

I am unable to provide a copy of my most recent pension benefit statement and it is not possible at this time to obtain a letter from my employer confirming my benefits as requested. I am aware of my current future benefits however and these are outlined below. They are based on my current salary and my service at retirement:

- (i) projected pension at my normal retirement date € _____ per annum
- (ii) projected tax-free lump sum benefits at my normal retirement date € _____
- (iii) spouse's pension at a % of my pension _____ %
- (iv) current value of any Additional Voluntary Contributions / PRSA AVCs € _____

I understand it is my responsibility to provide the correct figures. If these figures are incorrect, it is possible that my AVC fund could cause my benefits to exceed the maximum pension benefits allowed by Revenue. This may mean that my main scheme pension benefits will be reduced to reflect the excess AVC fund.

Signature: _____ Date: _____
PRSA Contributor

Declaration (Financial Adviser)

I am satisfied that the PRSA Contributor has captured above the correct benefits relating to their current defined benefit occupational pension scheme.

Signature: _____ Date: _____
Financial Adviser

