

Platform Service Bulletin



As we progress further into Pension Season 2014, our Platform Service Bulletin has been updated to reflect the current servicing experience for your main transactions. The timelines we have outlined below reflect the increased volumes of this busy period and are a realistic and practical guide for you to set and manage your customers expectations.

The timelines specified commence with effect from the day the final requirement has been received.

Remember: Click on the links below to access a support guide to your transactions, including an outline of the requirements needed for each.

Last Updated: 21 November 2014

Customer Request

When can you expect to receive confirmation that this has been completed?

New Business, Transfers In and Top Ups Pensions New Business

[New Business Policy Application](#)

5 Business Days

[Transfer Into your PORTUS plan](#)

7 Business Days

[Top Up \(Single and Regular Premium\)](#)

5 Business Days

[Willing and Able Request](#)

3 Business Days

Fund Switches and Alterations Pensions Existing Business

[Fund Switch](#)

3 Business Days

[Payment History](#)

7 Business Days

[Change of Employer/Trustee](#)

6 Business Days

[Leaving Service Options](#)

5 Business Days

Retirement Claims and ARF Payments Pensions Retirement Team

[ARF Withdrawal](#)

6 Business Days

[Retirement Lump Sum Payment](#)

6 Business Days

[Retirement Claim – ARF/AMRF to Irish Life](#)

8 Business Days

[Retirement Claim – Trivial Pension](#)

7 Business Days

[Retirement Claim – Annuity with Irish Life](#)

10 Business Days

[Retirement Options – Personal Pension & PRSA](#)

5 Business Days

[Retirement Options – Company Pension & AVC](#)

5 Business Days

We endeavour to action and complete all requests received, within the timelines specified.

Your Servicing Teams

Servicing Team	Look After	Contact
Pensions New Business	<ul style="list-style-type: none"> • New Business Quality Checking • Top Up Requests • Willing and Able Requests • Lump Sum & transfer Payments • Revenue & Pensions Board Approval 	Email: pensionsnewbusiness@irishlife.ie Fax: 01 242 2911
Pensions Existing Business	<ul style="list-style-type: none"> • Fund Switch Requests • Technical Charges Queries • General Policy Alterations • Complex Payment Histories • PRSA Quarterly Reports 	Email: pensionsexistingbusiness@irishlife.ie Fax: 01 680 3382
Pensions Retirement Team	<ul style="list-style-type: none"> • Retirement Options • Retirement Claims • Pension Transfers • ARF Payments • Pension Adjustment Orders • Pension Levy Deduction 	Email: pensionsretirementteam@irishlife.ie Fax: 01 242 2920
Broker Servicing – CSC Dundalk	<ul style="list-style-type: none"> • General Policy Information • Customer Alterations • Billing Payment Queries • Customer Online Services • Payment Alterations (Pup, skip, reduction etc.) 	Email: Broker.servicing@irishlife.ie Phone: 1850 60 20 80

Our Commitment to you...

We recognise the continued need to support you in providing superior customer service to your customers. So that you can continue to set and manage expectations with your customer, we will:

- ✓ Keep you updated on any significant changes to expected completion times for transactions
- ✓ Update our requirements and support documents with any changes that may occur
- ✓ Sign-post you to the correct servicing areas for your requests

We know that you may need to prioritise a customer request. The best way for you to do this, is to route your request through your account manager, who will liaise with the relevant servicing teams. This will ensure your request is treated with the utmost consideration.