

Personal Pension to PRSA transfer – Additional Requirements from life office

Pension New Business, Loc52
Irish Life Assurance plc
Lower Abbey Street
Dublin 1

Client Name: _____

Client Date of Birth: ____ / ____ / ____

Irish Life Reference number: _____

1) Is the transfer from an approved Retirement Annuity Contract issued under the Income Tax Act 1967 or Chapter 2 Part 30 of the Taxes Consolidation Act 1997?

YES ☐ NO ☐

2) Is the transferring plan ceasing? YES ☐ NO ☐

3) Have any benefits been paid to the member from this scheme? YES ☐ NO ☐

4) Has a Pension Adjustment Order been issued on pension benefits being transferred into this PRSA? YES ☐ NO ☐

If YES, please confirm if the amount being transferred relates to the member, or to the non-member spouse. Further information may also be required on some transfers involving PAOs.

Signed: _____ Date ____ / ____ / ____

Position: _____