

Company to Company Pension Transfer – Additional Information from trustees / Life Office

To:

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

Member Name: _____

Member Date of Birth: ____ / ____ / ____

Irish Life Reference number: _____

Is the scheme an approved scheme under Finance Act 1972 or Chapter 1, Part 30 of the Taxes Consolidation Act 1997?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Total value of assets being transferred	€
Value representing	
(a) Employer Contributions	€
(b) Employee Contributions	€
(c) AVCs	€
Name of transferring pension scheme:	
Name & address of trustee(s):	
Date of Joining Service	
Is member a 20% Director	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is member a 5% Director	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is scheme Revenue Approved	Yes <input type="checkbox"/> No <input type="checkbox"/>
Revenue Reference Number	

Are the total assets relating to this member being transferred?	Yes <input type="checkbox"/> No <input type="checkbox"/> Must be answered Yes
Is the transfer from a self-administered scheme?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does any of this transfer value relate to service with a previous employer? If Yes, please provide the following details from the previous employment: Date of Joining Service Date of Leaving Service Final Salary Details	Yes <input type="checkbox"/> No <input type="checkbox"/>
Has a Pension Adjustment Order (PAO) or other court order granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement? If yes we may required additional information.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Has the member left this employment, or left pensionable service in respect of this employment?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Additional Information required if the member has left service:

Date of Leaving Service	
Final Salary Details (For 20% Directors please provide remuneration details for at least 3 consecutive years ending not earlier than 10 years before the date of leaving service)	
Retirement Lump Sum Benefit Entitlement at retirement if value had remained in the transferring scheme?	€
Are you satisfied that the member's benefits have not exceeded the limits set down by the Revenue Commissioners?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Signed: _____ Date: ____ / ____ / ____

Position: _____