

# Approved retirement fund (ARF) Source of investment certificate

This certificate is required in accordance with Section 784B of the Taxes Consolidation Act 1997

## Section 1 Approved retirement fund (ARF) investment

*To be completed by Irish Life*

### Customer's details

Name in full

Address

Date of birth

 /  / 

Proposed amount to invest

Proposal number

Name of existing insurance company or qualifying fund manager or other source:



**Irish Life**

## Section 2 Source of investment

*To be filled in by the insurance company, qualifying fund manager, PRSA provider. Give details of the assets being used for this investment. Trustee of occupational pension schemes also fill this form in.*

Is the proposed investment amount being provided from an existing Approved Retirement Fund? Yes ☐ No ☐

If the answer is 'Yes' please confirm the gross value of all income drawdowns taken in the current tax year from the transferring ARF. If no income drawdown has been taken in the current tax year please confirm the amount as 'Nil'.

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If the answer is 'No', please describe where the investment is coming from, for example, a Retirement Annuity Contract, PRSA, Company Pension Plan, AVC Plan, Personal Retirement Bond (buy-out bond) or self-administered pension scheme.

If the proposed investment is coming from a Company Pension plan, please confirm the name of the Company Pension Scheme the investment is being transferred from

### We confirm that:

- the proposed investment amount to which this certificate relates comprises of assets to which the individual named above is beneficially entitled; and
- the assets to which this certificate relates do not form part of an Approved Minimum Retirement Fund (AMRF) within the meaning of Section 784C of the Taxes Consolidation Act 1997; and
- the assets to which this certificate relates derive from an approved source within the meaning of Section 784B of the Taxes Consolidation Act 1997.

Name in

BLOCK CAPITALS

Signature

Date

 /  / 

Position

Insurance Company/QFM/Other

# Approved minimum retirement fund (AMRF)

## Source of investment certificate

This certificate is required in accordance with Section 784D of the Taxes Consolidation Act 1997

### Section 1: Proposed Approved Minimum Retirement Fund (AMRF) Investment

*To be completed by Irish Life*

#### Customer's details

Name in full

Address

Date of birth

 /  / 

Proposed amount to invest

Proposal number

Name of existing insurance company or qualifying fund manager or other source:



**Irish Life**

### Section 2: Source of investment

*To be filled in by the insurance company, qualifying fund manager, PRSA provider. Give details of the assets being used for this investment. Trustee of occupational pension schemes also fill this form in.*

Is the proposed investment amount being provided from an existing Approved Minimum Retirement Fund? Yes ☐ No ☐

If the answer is 'Yes' please confirm the gross value of all income drawdowns taken in the current tax year from the transferring AMRF. If no income drawdown has been taken in the current tax year please confirm the amount as 'Nil'.

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And please confirm the gross amount contributed to the transferring AMRF

If the answer is 'No', please describe where the investment is coming from, for example, a Retirement Annuity Contract, PRSA, Company Pension Plan, AVC Plan, Personal Retirement Bond (buy-out-bond) or self administered pension scheme.

If the proposed investment is coming from a Company Pension plan, please confirm the name of the Company Pension Scheme the investment is being transferred from

#### We confirm that:

- the proposed investment amount to which this certificate relates comprises of assets to which the individual named above is beneficially entitled; and
- the assets this certificate relates to come from an approved source within the meaning of Section 784D of the Taxes Consolidation Act 1997.

Name in  
BLOCK CAPITALS

Signature

Date

 /  / 

Position

Insurance Company/QFM/Other