

**Personal Pension to Personal Pension 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? 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: \_\_\_\_\_