

Regular and Single Premium Top Up Form

For the most efficient application of funds to your plan, please ensure all relevant sections of this form are fully completed before submitting to our offices. Funds will only be applied and invested with effect from the date of receipt of all requirements. It is important to ensure that all information is provided from the outset.

Financial Adviser Details

Financial Adviser name	<input type="text"/>
Financial Adviser code	<input type="text"/>
Commission Profile	<input type="text"/> - <input type="text"/>

Plan Owner Details

Customer Name	<input type="text"/>
Plan Number	<input type="text"/>
Address	<input type="text"/> <input type="text"/>

Company Pensions:
Single Premium contributions to Company Pension arrangements may require a maximum funding check. If so, further information may be requested before contributions can be invested.

Single Premium Top Up Details

Proposed Top Up Amount	€ <input type="text"/>
Employer Contribution	<input type="text"/> % or € <input type="text"/>
Employee Contribution	<input type="text"/> % or € <input type="text"/>
AVC Contribution	<input type="text"/> % or € <input type="text"/>
Annual Salary	€ <input type="text"/> (for company pensions only)

Increase Regular Premiums

Frequency	Monthly <input type="radio"/> Quarterly <input type="radio"/> Half-yearly <input type="radio"/> Yearly <input type="radio"/>	
Effective date of increase	Next Direct Debit Date <input type="radio"/> or <input type="text"/>	
	Old Premium	New Premium
Employer Contribution	€ <input type="text"/>	€ <input type="text"/>
Employee Contribution	€ <input type="text"/>	€ <input type="text"/>
AVC Contribution	€ <input type="text"/>	€ <input type="text"/>
Total Contribution	€ <input type="text"/>	€ <input type="text"/>

Regular Premiums will automatically be invested in the current fund choice unless we are advised otherwise.

Fund Choice - Single Premiums Only

Note: If a lifestyling investment strategy is in operation on a plan, we will automatically invest funds in line with the chosen strategy.

I wish to invest the above outlined contribution in my current, existing fund choice ☐

Or I wish to invest the above outlined contribution in the following fund choices:

<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %

Please note that fund choice is in respect of the top up amount only.

Any change to the customers current investment holding will require a separate instruction.

Please read your **Fund Guide** for a full list of the funds available.

Self Invested Fund:
If contributions are to be invested in the Self Invested Fund, Irish Life will require a completed Investment Instruction Form

Source of Wealth - Personal Investment Bond Only

To comply with the current Anti Money Laundering and Terrorist Financing legislation, Irish Life Assurance plc is required to ask you about the original source of your wealth in respect of this application. Please tick the relevant box(es) and indicate the source of your investment amount.

It is assumed that personal identification and proof of address have been supplied at proposal stage. If your address has changed within the last 6 months, please provide updated proof of address

- | | |
|---|---|
| 1. Salary, bonus or regular savings <input type="radio"/> | 6. Inheritance <input type="radio"/> |
| 2. Early retirement or redundancy payment <input type="radio"/> | 7. Windfall/compensation payments <input type="radio"/> |
| 3. Proceeds from the sale of investments or other assets <input type="radio"/> | 8. Other (give details) <input type="radio"/> |
| 4. Proceeds from the maturity/encashment of Irish Life plan <input type="radio"/> | |
| 5. Proceeds from the maturity/encashment of a plan <input type="radio"/>
with another life assurance company | |

Source of Funds - Personal Investment Bond Only

- | | |
|---|----------------------------------|
| Personal cheque from proposer(s) bank account <input type="radio"/> | Bank Draft <input type="radio"/> |
| Direct Debit from proposer(s) bank account <input type="radio"/> | EFT <input type="radio"/> |

Please give details of account drawn from

Name of Bank	<div></div>
Address of Bank	<div></div>
Debtor Bank Identifier Code (BIC)	<div></div>
Debtor Name	<div></div>
IBAN	<div></div>

- | | |
|---|-----------------------|
| Encashment/Maturity proceeds of existing policy | <input type="radio"/> |
| Other (eg Employer's Payroll scheme, Postal or Money order etc) | <input type="radio"/> |

Please give details

Client Declaration to Irish Life

I declare that the answers to all the questions in this application form are in every respect true, and correctly reflect the intended investment in this contract. I hereby authorise Irish Life to apply the additional contribution to the above policy as specified above, in accordance with the policy terms and conditions and agree that this application form shall form part of my contract with Irish Life.

 Please sign and date

Client Signature	<div>X</div>
Date	<div><div></div><div></div><div></div><div></div><div></div></div>

Trustee Declaration to Irish Life (Company Pensions Only)

I declare that the answers to all the questions in this application form are in every respect true, and correctly reflect the intended investment in this contract. I hereby authorise Irish Life to apply the additional contribution to the above policy as specified above, in accordance with the policy conditions and agree that this application form shall form part of my contract with Irish Life.

 Please sign and date

Trustee Signature	<div>X</div>
Date	<div><div></div><div></div><div></div><div></div><div></div></div>

Note: Where ITS or DTS have been appointed as independent trustees, we will accept the top up instruction from the member. In such cases, the above client declaration only, should be completed.



Irish Life