

Quick Guide to applying for the Self-Invested Fund



Tracker Bonds

For further information click on the underlined Hyperlinks below, or visit the SIF Deposit Information Centre on [BLine](http://www.bline.ie).

Available Contracts	Pre-Retirement		Post-Retirement:
	<ul style="list-style-type: none">• Complete Solutions 1;• Complete Solutions 2;• PRSA Options• Investment Only		<ul style="list-style-type: none">• ARF/AMRF 1;• ARF/AMRF 2
Documentation required (click on link, or visit www.bline.ie)	New Case	Top-up	Switch
	<ul style="list-style-type: none">• Proposal Form;• Investment Instruction Form	<ul style="list-style-type: none">• Investment Instruction Form;	<ul style="list-style-type: none">• Investment Instruction Form;
Timescale (on receipt of full requirements, including commission option)	The issue of Policy Documents is dictated by the Closing Date of the Bond. We cannot guarantee that applications/outstanding requirements received after the Closing Date will get invested in the tracker bond in question.		
Liquidity (cash held to pay certain charges)	Due to the varied nature of individual Tracker Bonds, the liquidity required will be assessed by the Self Invested Fund Team on a case-by-case basis. For a guideline of the liquidity required, please refer to the Tracker Liquidity Calculator on Bline. Liquidity requirements are defined on the Investment Instruction Form , and covered in the Self Invested Fund Guide .		
Available tracker bonds/ brochures	Please refer to the Tracker Bond section of www.bline.ie for details of current Tracker Bond providers including links to their websites and their contact details.		
Minimum investment	€20,000		
Other charges	In addition to the Irish Life charge, there may be additional charges, fees and commissions payable from the Tracker Bond. Please review all proposed investments and literature in regard to underlying charges as Irish Life does not review these charges.		
Viewing the Self Invested Fund	You can view your customer's Self Invested Fund holdings and transaction history by logging in to the My Biz section of www.bline.ie .		
Contact detail	Telephone: 01 704 1831 Fax: 01 704 1988 Email: selfinvestedteam@irishlife.ie		

