



Personal Pension

Application Form

PLEASE READ THE QUESTIONS CAREFULLY BEFORE ANSWERING THEM AND USE BLOCK CAPITALS.

If any item is blank or illegible, this will cause a delay in processing your application.

1. FINANCIAL ADVISER DETAILS

Financial adviser name

Financial adviser code

2. PROFILE NUMBER

Regular - Lump sum - If this section is left blank this will delay us processing your application.

3. PRODUCT SELECTION

Please tick which product you require

Complete Solutions Personal 1 or Complete Solutions Bond Personal 1 OR Complete Solutions Personal 2 or Complete Solutions Personal Bond

4. ELIGIBILITY

- Are you self-employed or a partner acting in some trade, profession or occupation? Yes No
Your self-employment, employment or occupation must be liable to tax under schedule D (case I or II) or E in the Republic of Ireland.
- Are you an employed person or the holder of an office of employment? Yes No
If Yes, is one or more of your occupations non-pensionable? Yes No
- Are you an Irish resident for tax purposes? Yes No
- Please give policy numbers of any existing retirement contracts with Irish Life

5. PERSONAL DETAILS

Title (Mr/Mrs/Ms) First Name

Initial (if applicable) Surname

Previous Surname (if any)

Home address

Date of Birth / / Male Female

Marital Status Single Married Separated Divorced Widowed Registered Civil Partner

E-mail address (if applicable)

Contact Phone Numbers Home Mobile

Chosen Retirement Age Must be between the ages of 60 and 75.

6. REGULAR CONTRIBUTION DETAILS

If regular contributions are being made please complete the following details

Start date of plan / /

Contribution Amount € per Month Quarter Half year Year

Do you want inflation protection? Yes No

(Contributions will increase in line with inflation or a rate set by Irish Life (at present 5% p.a.) whichever is higher)

How are regular contributions to be made Direct debit Cheque

Cheques for regular contributions can only be made when contributions are made on a yearly basis and exceed €3000.

If direct debit contributions chosen, what day of the month would you like direct debits taken? (1st to 28th of the month only)

7. LUMP SUM

Lump Sum Contribution € (by cheque only)

8. FUND DETAILS

Please see your Fund Guide for a full list of available funds. You can split your investment between up to 10 funds

	%
Protected Consensus Markets Fund	<input type="text"/>
Core Fund	<input type="text"/>
Consensus Fund	<input type="text"/>
Global Cash Fund	<input type="text"/>
Indexed Euro Short Dated Bond Fund	<input type="text"/>
Indexed Euro Corporate Bond Fund	<input type="text"/>
Active Managed Fund	<input type="text"/>
Bloxham High Yield Fund	<input type="text"/>
Indexed Commodities Fund	<input type="text"/>
Indexed World Equities Fund	<input type="text"/>
UK Property Fund	<input type="text"/>
Fidelity EMEA Fund	<input type="text"/>
Fidelity India China Fund	<input type="text"/>

The risk level and volatility rating of a fund can change from time to time. Please visit our website www.irishlife.ie to see the most up-to-date fund information.

	%
Self-Invested Fund*	<input type="text"/>

*Please refer to Your guide to your Self-Invested Fund booklet for the minimum amount required to invest in a Self-Invested Fund. Please also complete a separate Investment Instruction Form.

Other Funds	%
<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"/>

All regular and lump sum contributions will be invested in this way. If you would like regular contributions to be invested as above and lump sum contributions to be invested differently, how would you like lump sums to be invested?

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

Lifestyling strategies are not available if you invest in the Self-invested fund or a property fund.

If you wish to avail of a Lifestyling Strategy, please complete:

Irish Life offers 3 Lifestyling Strategies below which gradually moves your chosen fund(s) into specific funds over the term of your plan. A detailed description of each Strategy is given in your product booklet. **You should ensure you are happy with the risk level of each fund in these Strategies.**

I am funding for an annuity at retirement through the Annuity Lifestyling Strategy

I am funding for an ARF at retirement through the ARF Income Lifestyling Strategy

I am funding for an ARF at retirement through the ARF Investment Lifestyling Strategy

9. DIRECT MARKETING CONSENT (only to be completed if product is taken out through an Irish Life Financial Adviser or tied agent)

The information you give here will be used to process this application on computer. We may also use this information to send you details of other products from the companies within the Irish Life and Permanent Group (a financial services group mainly made up of life assurance, banking and personal finance companies). For this purpose, we may pass this information to the other companies within the group. If you do not wish to receive such Direct Marketing information please tick here

The option to decline this service may be exercised any time in the future (even if you do not tick here) by simply writing to the Marketing Department, Irish Life, Lower Abbey Street, Dublin 1.

10. DECLARATION UNDER REGULATION 6(3) OF THE LIFE ASSURANCE (PROVISION OF INFORMATION) REGULATIONS (2001)

WARNING

If you propose to take out this policy in complete or partial replacement of an existing policy, please take special care to satisfy yourself that this policy meets your needs. In particular, please make sure you are aware of the financial consequences of replacing your existing policy. If you are in doubt about this, please contact your insurer or insurance intermediary. Please complete this section by ticking the appropriate box:

This policy does not replace an existing policy This policy does replace an existing policy

Policy or Reference Number

Is this an Irish Life Policy Yes No

Declaration of Intermediary

I hereby declare that in accordance with Regulation 6(1) of the Life Assurance (Provision of Information) Regulations, 2001

Name of Client

(the client) has been provided with the information specified in Schedule 1 to those Regulations and that I have advised the client as to the financial consequences of replacing an existing policy with this policy by cancellation or reduction, and of possible financial loss as a result of such replacement.

Signature of intermediary:

On behalf of (company name)

Date

Declaration of Client

I confirm that I have received in writing the information specified in the above declaration.

Signed (signature of client)

Date

11. DECLARATION TO IRISH LIFE

I declare that all the answers to all the questions in this application form are in every respect true and correct. I hereby agree that the contract proposed between me and Irish Life Assurance plc will be based on this application and declaration. I understand that this contract shall not be capable of being surrendered, commuted or assigned except as provided under Chapter 2 of Part 30 of the Taxes Consolidation Act 1997.

I authorise Irish Life Assurance plc (ILA) and its agents to hold and process information in connection with this contract or transaction. This includes any other information supplied to or obtained by ILA separately. ILA may hold and process this information for administrative, customer care and services purposes. I consent to Irish Life Assurance plc disclosing this information to persons necessary in connection with this contract or transactions including regulatory authorities, other companies in the Company's group, other insurance companies or as required by law.

I confirm that I have read and understood all parts of the above declaration.

Signature of Plan Owner

Date

12. DIRECT DEBIT MANDATE

Instruction to your Bank to pay Direct Debits



Originators Identification No.(OIN)

Please complete parts 1 to 4 to instruct your Bank to make payments directly from your account. Then return the form to:-
Irish Life, Lower Abbey Street, Dublin 1.

Originators Reference (Max 18 chars)

1 Please write the name & full address of your bank & branch

Bank

Branch

2 Name of account holder

3 Sort Code Account Number

4 Your instructions to the Bank, and your Signature

- I instruct and authorise you to pay Direct Debits from my account at the request of Irish Life plc.
- I confirm that the amounts to be debited are variable and may be debited on various dates.
- I shall duly notify the Bank in writing if I wish to cancel this instruction. I shall also so notify Irish Life plc of such cancellation.

The Direct Debit Guarantee

- This is a guarantee provided by your own Bank as a member of the Direct Debit Scheme, in which Banks and Originators of Direct Debits participate.
- If you authorise payment by Direct Debit, then
 - Your Direct Debit Originator will notify you in advance of the amounts to be debited to your account
 - Your Bank will accept and pay such debits, provided that your account has sufficient available funds
- If it is established that an unauthorised Direct Debit was charged to your account, you are guaranteed an immediate refund by your Bank of the amount so charged where you notify your bank without undue delay on becoming aware of the unauthorised Direct Debit, and in any event no later than 13 months after the date of debiting of such Direct Debit to your account.
- You are entitled to request a refund of any Variable Direct Debit the amount of which exceeded what you could have reasonably expected, subject to requesting your Bank within a period of 8 weeks from the date of debiting of such Direct Debit to your account.
- You can instruct your Bank to refuse a Direct Debit payment by writing in good time to your Bank.
- You can cancel the Direct Debit Instruction in good time by writing to your Bank

Signature (s) Date / /

13. YOUR PLAN COMMUNICATIONS

How would you like to receive your plan communications from us? (for example, your welcome pack, letters and regular statements)

Please tick one option: Online at www.irishlife.ie By paper post

Your plan communications will be securely stored in your personal online account at www.irishlife.ie.
You will be notified by text and email when communications are added to your account.
If you do not choose an option we will assume you want to receive communications by paper post.