

## Irish Life Requirements

Please note the following requirements are needed when submitting transfer values to Irish Life

- Cheque to be made payable to Irish Life Assurance.
- Confirmation of the relevant section below regarding the transferring pension arrangement (this needs to be from the trustees or transferring life office).

### Section 1

#### Transfer from a Company Pension

1. Is full value being submitted to Irish Life
2. Is the transfer from an exempt approved Company Pension scheme under Chapter 1 Part 30 of the Tax Consolidation Act 1997?
3. Name of the transferring Pension Scheme
4. Is this scheme Defined Contribution or Defined Benefit?
5. How long has the individual been a member of this scheme (including years as a member of any other scheme related to this employer or with any person connected with this employer)?
6. Has the member left service with the relevant employer? Yes \_\_\_\_\_ No \_\_\_\_\_
7. Is the transferring scheme being wound-up? Yes \_\_\_\_\_ No \_\_\_\_\_
8. Have any benefits been paid to the member from this scheme) Yes \_\_\_\_ No \_\_\_\_\_
9. Are all of the member's benefits being transferred, or is the transfer solely of AVCs paid by the member (if solely AVCs then please contact us as additional information is needed)
10. Does the transfer value represent a return of contributions, or the value of accrued benefits, where the member has no preserved benefit? Yes \_\_\_\_\_ No \_\_\_\_\_
11. Has a Pension Adjustment Order been issued on pension benefits being transferred into this PRSA? (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 a PAO.

### Section 2

#### Transfer from a Personal Pension (Retirement Annuity Contract)

1. Is the transfer from an approved Retirement Annuity Contract issued under the Income Tax Act 1967 or Chapter 2 of Part 30 of the Taxes Consolidation Act 1997?
2. Is the transferring pension plan ceasing? Yes \_\_\_\_\_ No \_\_\_\_\_
3. Have any benefits been paid to the contributor from this pension plan? Yes \_\_\_\_ No \_\_\_\_
4. Has a Pension Adjustment Order been issued on pension benefits being transferred into this PRSA? (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 a PAO.

### Section 3

#### Transfer from a PRSA

1. Is the transfer from an approved PRSA contract issued under Part X of the Pensions Act 1990 and Chapter 2A of Part 30 of the Taxes Consolidation Act 1997?
2. Is the transferring plan a Standard PRSA or a Non-standard PRSA?
3. Have any benefits been paid to the contributor from this pension plan? Yes \_\_\_ No\_\_
4. Is this a transfer of Additional Voluntary PRSA Contributions (AVC PRSA / PRSA AVC)?
5. Has a Pension Adjustment Order been issued on pension benefits being transferred into this PRSA? 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 a PAO.

### Section 4

#### If transfer is from a pension arrangement outside of the Republic of Ireland

1. Has the scheme/contract been approved by the Regulator in your country as a pension arrangement? Yes \_\_\_ No\_\_\_
2. Does the Regulator in your country allow this transfer out? Yes \_\_\_ No \_\_\_
3. Does the scheme/contract allow this transfer out? Yes \_\_\_ No \_\_\_
4. Have any benefits been paid to the member from the pension? Yes \_\_\_ No \_\_\_
5. Has the scheme/contract accepted a transfer from an Irish pension arrangement within the last year? Yes \_\_\_ No \_\_\_
6. Has a Pension Adjustment Order or similar order been issued on pension benefits being transferred into this PRSA? 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 a Pension Adjustment Order. (A Pension Adjustment Order is an order that grants part of the member's pension to his/her spouse in the event of divorce or separation).