



## Self-Invested Fund

The Self-Invested Fund Team is a Pension Servicing Team that is dedicated to servicing all business for the Self-Invested Fund

Our aim is to provide you with a personal, friendly and efficient service. Our team of professional contacts will process all Self-Invested Fund new business, top-ups & switches and respond to all phone, post and email queries.

### Designated contacts to look after all your Self-Invested Fund queries



Lorna O'Keeffe



Anne Cornally



Karen Tuke

Telephone: 01-704-1831

Fax: 01-704-1988

This is a right-fax facility enabling you to fax directly to our email account with documentation that you might normally have posted.

Email:  
selfinvestedteam@irishlife.ie

Postal Address:  
Self-Invested Fund Team, Location 613, Irish Life Centre,  
Lower Abbey St., Dublin 1



Tina Duggan



Alan Bennett



Neil Candy

### OPENING HOURS:

Monday to Friday - 9am to 5pm



Aideen Geraghty  
Team Manager  
Self-Invested Fund

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James Waldron  
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# Our service to you

Irish Life continues to invest heavily towards making it easier to do business using our online system 'bline'

[www.bline.ie](http://www.bline.ie)

At the touch of a button, you can access a wide range of information specifically for the Self-Invested Fund

**Your Guide to the Self-Invested Fund:** Complete guide to the Self-Invested Fund

**Investment Instruction Forms:** Forms required to buy, sell or switch in the Self-Invested Fund

**Portfolio Valuation Statements/Trade Confirmations:** Plan/Trade specific information – You can access this via the 'Valuation Report' button on Fund Details & Current Values page

**Daily Deposit Rates:** Most up to date deposit rates available

**Execution-Only Service Information:** User Guide, Frequently Asked Questions and 'White List' of funds that can be traded

You can also access...

**Client Details:** All client details are available including name, address, PPSN & the plan owner

**Payment Details:** Premium details and bank details and on term plans, the risk cost

**Payment History:** History of payments and top-ups added to the plan

**Fund Switch:** The system will inform you if there is a switch outstanding on the plan

**Fund Details & Current Values:** Self-Invested Fund Valuation statement is available here (as outlined above)

**Business Retention & Persistency:** This section contains information regarding your book of business – losses, persistency and related alerts on your customers' plans

**Document Store:** You can get copies of Annual Benefit Statements (ABS), Commission Statements, Encashment Letters, Plan Documents, Underwriting Special Terms Letters, Premium Billing Letters and many more....