



Irish Life

Pension Processes Your A to Z Guide

LIFE

PENSIONS

INVESTMENTS

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Personal Pensions

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PRSAs

Section 3:
Company Pensions

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- Useful Contacts
- Evidence of Salary
- Confirmation Employment Ceased

New Business

Top Ups

Plan Alterations

- Fund Switches
- Premium Reductions
- Premium Holidays
- Paid Up Requests

Transfers

Retirement Claims

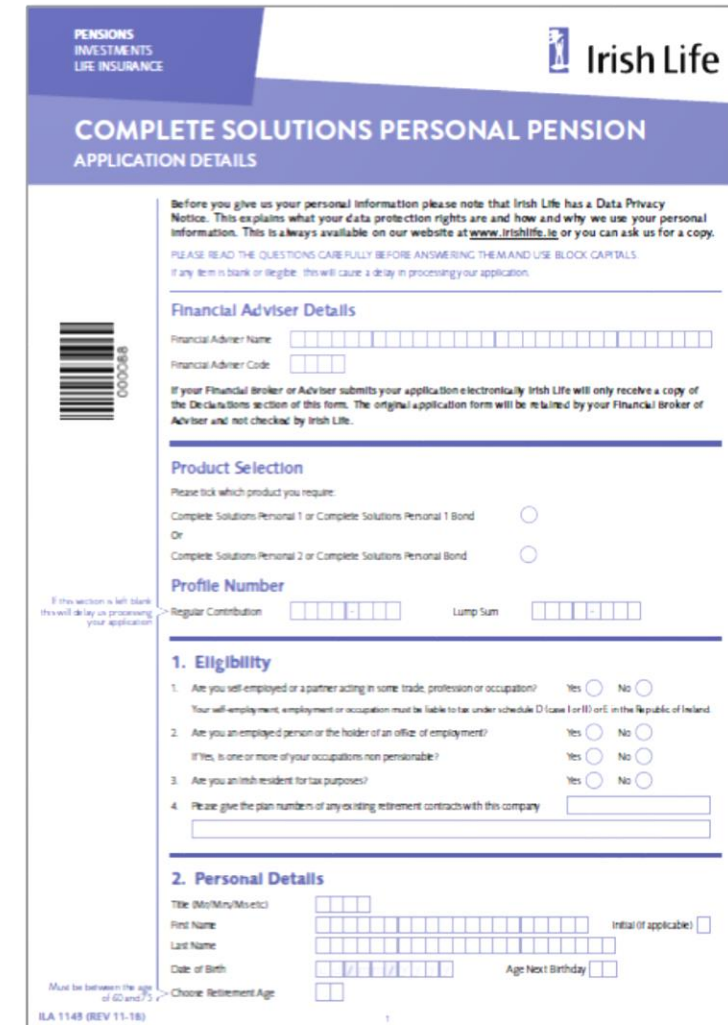
Death Claims


Requirements

- [Personal Pension Application Form](#)

Eligibility:

- Self-Employed with income taxed under Schedule D, Case I or II, or
- Employee with Schedule E salary who is not a member of their employer's company pension scheme.



PENSIONS INVESTMENTS LIFE INSURANCE 

COMPLETE SOLUTIONS PERSONAL PENSION APPLICATION DETAILS

Before you give us your personal information please note that Irish Life has a Data Privacy Notice. This explains what your data protection rights are and how and why we use your personal information. This is always available on our website at www.irishlife.ie or you can ask us for a copy.

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.

Financial Adviser Details

Financial Adviser Name:

Financial Adviser Code:

If your Financial Broker or Adviser submits your application electronically Irish Life will only receive a copy of the Declarations section of this form. The original application form will be retained by your Financial Broker or Adviser and not checked by Irish Life.

Product Selection

Please tick which product you require:

Complete Solutions Personal 1 or Complete Solutions Personal 1 Bond

Or

Complete Solutions Personal 2 or Complete Solutions Personal Bond

Profile Number

Regular Contribution Lump Sum

1. Eligibility

1. 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.

2. 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

3. Are you an Irish resident for tax purposes? Yes No

4. Please give the plan number of any existing retirement contracts with this company

2. Personal Details

Title (Mr/Ms/Ms etc)

First Name Initial (if applicable)

Last Name

Date of Birth Age Next Birthday

Choose Retirement Age

Must be between the age of 22 and 75

ILA 1148 (REV 11-16)

Requirements

1. Written instruction from client to increase regular payment or apply single payment, and confirming investment fund
 - Irish Life will also accept a photograph or scanned copy of client's written instruction. This can be emailed to broker for onward email to Irish Life
2. Confirmation of commission choice from broker

Requirements

- See the [Pension Transfer Pathfinder](#) for full requirements

Pension Transfer Pathfinder

v0.190527



In a few steps, this pathfinder tool will guide towards your requirements for transferring a pension into an existing or new Irish Life pension product.

Get an exact answer in just a few seconds.

[Get Started >](#)

[or view all documents as a list](#)

In all cases Irish Life may need to request further information from the transferring office. For more information please contact your Irish Life Account Manager.

Fund Switches:

- Instruction from client confirming fund switch details.

Premium Reductions:

- Instruction from client confirming new premium amount and the date the reduction is to take place.

Premium Holidays:

- Instruction from client confirming start and end date of premium holiday.

Paid Up Plan

- Instruction from client confirming the date the plan is to be made paid up.

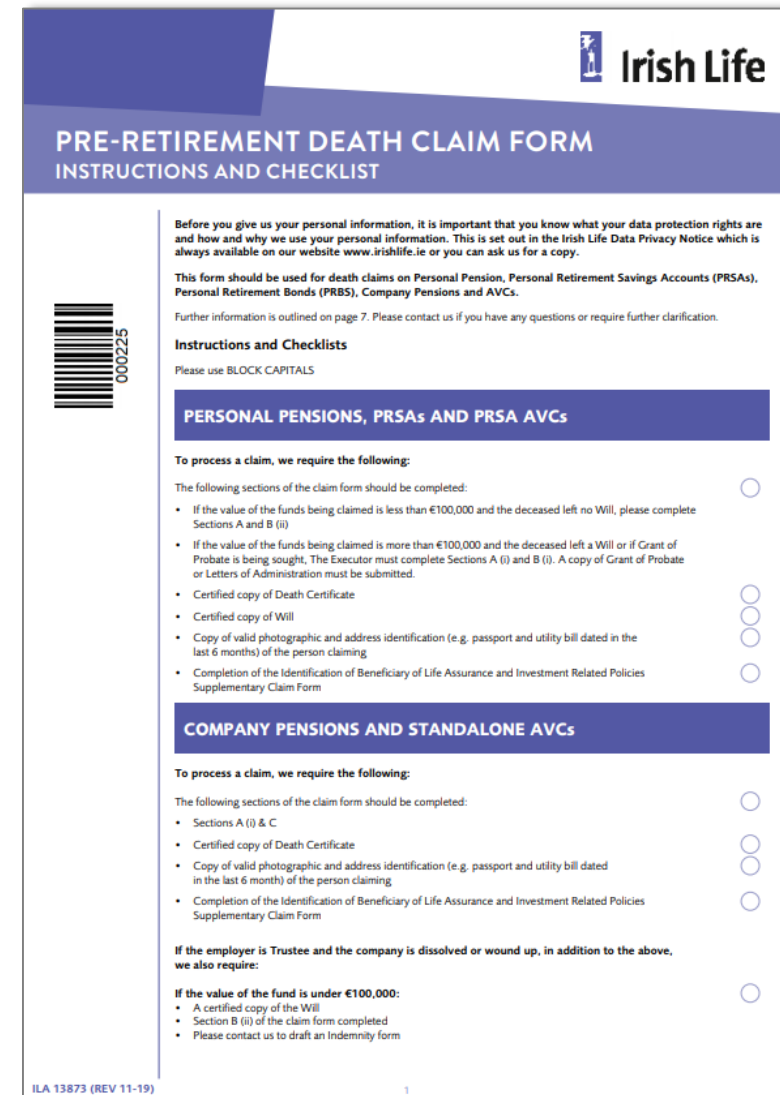
Client Instruction:

This can be emailed to broker for onward email to Irish Life.

Irish Life also will accept a photograph or scanned copy of client's written instruction.

Requirements

1. [Pre-Retirement Death Claim Form](#)
2. Copy of Death Certificate
3. Copy of Grant of Probate or Letters of Administration
4. Copy of Will if applicable
5. ID and evidence of address for claimant (e.g. passport and utility bill dated within the last 6 months).



Irish Life

PRE-RETIREMENT DEATH CLAIM FORM INSTRUCTIONS AND CHECKLIST

Before you give us your personal information, it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website www.irishlife.ie or you can ask us for a copy.

This form should be used for death claims on Personal Pension, Personal Retirement Savings Accounts (PRSAs), Personal Retirement Bonds (PRBs), Company Pensions and AVCs.

Further information is outlined on page 7. Please contact us if you have any questions or require further clarification.

Instructions and Checklists

Please use BLOCK CAPITALS

PERSONAL PENSIONS, PRSAs AND PRSA AVCs

To process a claim, we require the following:

The following sections of the claim form should be completed:

- If the value of the funds being claimed is less than €100,000 and the deceased left no Will, please complete Sections A and B (ii)
- If the value of the funds being claimed is more than €100,000 and the deceased left a Will or if Grant of Probate is being sought, The Executor must complete Sections A (i) and B (i). A copy of Grant of Probate or Letters of Administration must be submitted.
- Certified copy of Death Certificate
- Certified copy of Will
- Copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

COMPANY PENSIONS AND STANDALONE AVCs

To process a claim, we require the following:

The following sections of the claim form should be completed:

- Sections A (i) & C
- Certified copy of Death Certificate
- Copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

If the employer is Trustee and the company is dissolved or wound up, in addition to the above, we also require:

If the value of the fund is under €100,000:

- A certified copy of the Will
- Section B (ii) of the claim form completed
- Please contact us to draft an Indemnity form

ILA 13873 (REV 11-19) 1

New Business

Top Ups

Plan Alterations

- Fund Switches
- Premium Reductions
- Premium Holidays
- Paid Up Requests

Transfers

Retirement Claims

Death Claims

Requirements:

- [PRSA Application Form](#)
- For PRSA AVCs: Sections F and G of the application form and for DB Schemes
 - Pension Benefit Statement or
 - DB Details included on application form and signed by employer, HR Department or client
- For Salary Deduction PRSAs or PRSA AVCs: the employer must complete
 - the Payroll Deduction Authority Form on page 13 of the application form, and
 - [PRSA Employer Designation Form](#), if the employer has not completed one with Irish Life previously.

PRSA or PRSA AVC?

PRSAs are for

- Self-Employed with income taxed under Schedule D, Case I or II, or
- Employees with Schedule E salary who are not members of their employer's company pension scheme.

PRSA AVCs are for

- Employees with Schedule E salary who are members of their employers company pension scheme and want to make additional voluntary contributions.

PRSAs for Self-Employed or Paid from Employee's Account

- [PRSA Top Up Form](#)
- or
- Written instruction from client to increase regular payment or apply single payment, and confirming investment fund
 - Irish Life will also accept a photograph or scanned copy of client's written instruction. This can be emailed to broker for onward email to Irish Life
- and
- Confirmation of commission choice from broker

Salary Deducted PRSAs

1. [Payroll Deduction Authority Form](#)
completed by the employer / nominated payroll administrator
2. Confirmation of commission choice from broker

Requirements

- See the [Pension Transfer Pathfinder](#) for full requirements

Pension Transfer Pathfinder

v0.190527



In a few steps, this pathfinder tool will guide towards your requirements for transferring a pension into an existing or new Irish Life pension product.

Get an exact answer in just a few seconds.

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Choose the appropriate option

PRSA for

- Self employed client, or
- Employee paid from their own account.

Salary Deducted PRSA

Requirements for PRSAs for Self-Employed or paid from the employee's bank account

Premium Reductions:

- Instruction from client confirming new premium amount and the date the reduction is to take place.

Premium Holidays:

- Instruction from client confirming start and end date of premium holiday.

Paid Up Plan:

- Instruction from client confirming the date the plan is to be made paid up.

Fund Switches:

- Instruction from client confirming fund switch details.

Client Instruction:

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Requirements For Salary Deduction PRSAs

Fund Switches:

- Instruction from client confirming fund switch details
 - This can be emailed to broker for onward email to Irish Life
 - Irish Life will also accept a photograph or scanned copy of client's written instruction.

Premium Reductions:

- [Payroll Deduction Authority Form](#) completed by the employer.

Premium Holidays:

- [Payroll Deduction Authority Form](#) completed by the employer.

Paid Up Plan:

- [Payroll Deduction Authority Form](#) completed by the employer.

Requirements

1. [PRSA Retirement Claim Form](#)
2. Evidence of age (birth cert, passport or drivers licence)
3. A copy of client's bank statement dated within the last 6 months, showing name, address, BIC & IBAN
4. For early retirement:
 - In all cases: P45 or copy of [Job or Pension Details pdf](#) from Revenue's myAccount confirming employment has ceased.
 - For 20% Directors: confirmation from company accountant that the director disposed of their shareholding.

Along with

Based on the client's chosen option at retirement:

- [AMRF/ ARF Application Form](#)
- Evidence of guaranteed income or details of existing AMRF, if applicable
- [Annuity Application Form](#)

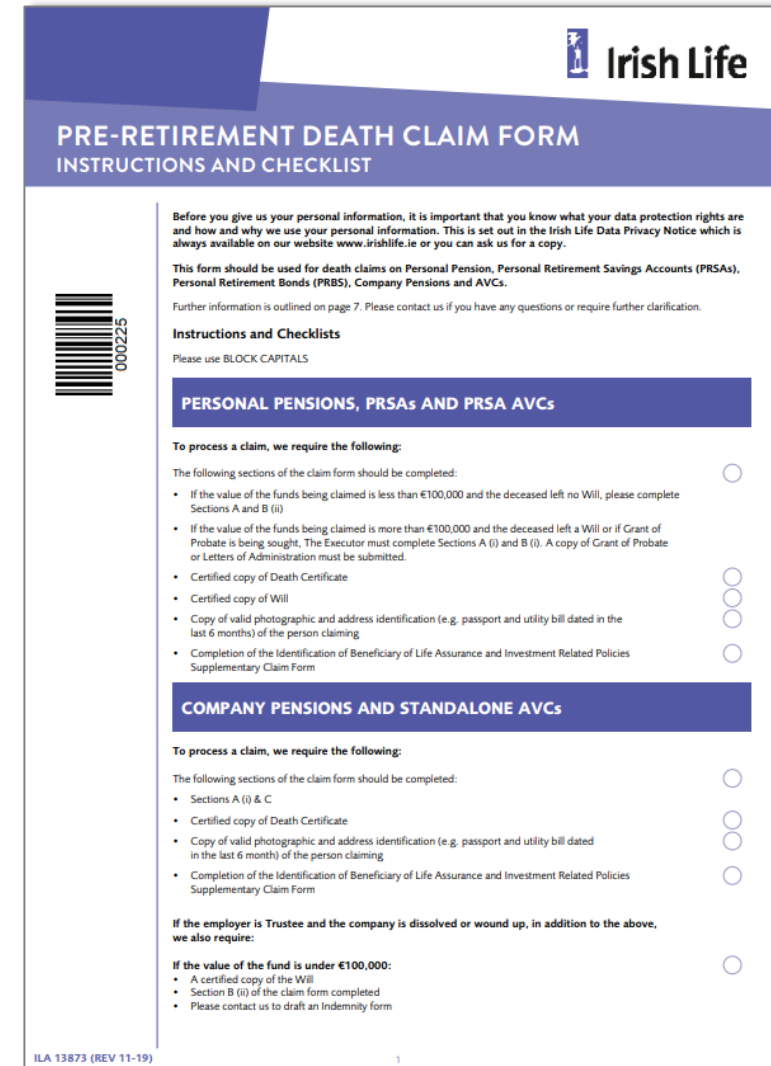
Early Retirement Note

Early retirement is available from age 50 where the individual was an employee and they are not currently employed or self-employed.

20% directors must also sever all links with the company and dispose of their shareholding.

Requirements

1. A fully [Pre-Retirement Death Claim Form](#)
2. Copy of Death Certificate
3. Copy of Grant of Probate or Letters of Administration
4. Copy of Will if applicable
5. ID and evidence of address (within 6 months) for claimant



Irish Life

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PERSONAL PENSIONS, PRSAs AND PRSA AVCs

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- If the value of the funds being claimed is more than €100,000 and the deceased left a Will or if Grant of Probate is being sought, The Executor must complete Sections A (i) and B (i). A copy of Grant of Probate or Letters of Administration must be submitted.
- Certified copy of Death Certificate
- Certified copy of Will
- Copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

COMPANY PENSIONS AND STANDALONE AVCs

To process a claim, we require the following:

The following sections of the claim form should be completed:

- Sections A (i) & C
- Certified copy of Death Certificate
- Copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

If the employer is Trustee and the company is dissolved or wound up, in addition to the above, we also require:

- A certified copy of the Will
- Section B (ii) of the claim form completed
- Please contact us to draft an Indemnity form

ILA 13873 (REV 11-19) 1

New Business

Top Ups

Plan Alterations

- Fund Switches
- Premium Reductions
- Premium Holidays
- Paid Up Requests

Transfers

Retirement Claims

Death Claims

Who is the trustee of the company pension scheme?

The Employer

**DTS or ITS as an
Independent Trustee**

Requirements where employer is trustee

- [Company Pension Top Up Form](#) completed by the employer
- or
- Written instruction from employer to increase regular payment or apply single payment and confirming investment fund
 - Irish Life can accept a scanned copy or photograph of employer's written instruction.
 - Instruction should clearly state the new payment amount and split between employer, employee and AVC
- and
- Confirmation of commission choice from broker

Note: Employer instruction should be on company letter headed paper from a director, company secretary or someone authorised to act for and on behalf of the company.

Along with

- Evidence of Salary
 - This can be a scanned copy / photograph of a payslip or [Employment Details Summary pdf](#) from Revenue's myAccount
 - Pension Details from the employer, member or broker
 - Required:
 - Details of payments to any other scheme relating to same employment, and
 - Current value of any other pensions relating to same employment
 - Optional: Current value of any other pensions relating to past employments or self-employments *
- This information can be provided as part of the top up form or separately.

* If this information is not provided we will run the maximum funding check on the strict scale. However, we may require further information before any top ups can be processed.

Requirements for DTS or ITS as Independent Trustee

- [Company Pension Top Up Form](#) completed by the employer and employee
- or
- Instruction from employer to increase regular payment or apply single payment,
 - This should clearly state the new payment amount and split between employer, employee and AVC
- and
- Confirmation of fund choice from employee
 - Irish Life can accept a scanned copy or photograph of employee's written instruction. This can be emailed to broker for onward email to Irish Life
- and
- Confirmation of commission choice from broker

Note: Employer instruction should be on company letter headed paper or on company email and from a director, company secretary or someone authorised to act for and on behalf of the company.

Along with

- Evidence of Salary
 - This can be a scanned copy / photograph of a payslip or [Employment Details Summary pdf](#) from Revenue's myAccount
- Pension Details from the employer, member or broker

Required:

- Details of payments to any other scheme relating to same employment, and
- Current value of any other pensions relating to same employment

Optional: Current value of any other pensions relating to past employments or self-employments *

This information can be provided as part of the top up form or separately

* If this information is not provided we will run the maximum funding check on the strict scale. However, we may require further information before any top ups can be processed.

Who is the trustee of the company pension scheme?

The Employer

DTS or ITS an Independent Trustee

Requirements where the employer is trustee

Fund Switches:

- Instruction from employer confirming fund switch details

Premium Holidays:

- Instruction from employer confirming start and end date of premium holiday

Paid Up Plan:

- Instruction from employer confirming the date the plan is to be made paid up.

Premium Reductions:

- Instruction from employer confirming
 - New premium amount
 - Employer, employee and AVC split,
 - Date the reduction is to take place

Employer Instruction:

This should come from a director, company secretary or someone authorised to act for and on behalf of the company.

In all cases this can be emailed to broker for onward email to Irish Life.

Irish Life will also accept a photograph or scanned copy of the employer's written instruction.

Requirements for DTS or ITS as an Independent Trustee

Fund Switches:

- Instruction from member confirming fund switch details

Premium Holidays:

- Instruction from employer confirming start and end date of premium holiday

Paid Up Plan:

- Instruction from employer confirming the date the plan is to be made paid up.

Premium Reductions:

- Instruction from employer confirming
 - New premium amount
 - Employer, employee and AVC split,
 - Date the reduction is to take place

Employer / Member Instruction:

In all cases the letter can be emailed to broker for onward email to Irish Life.

Irish Life will accept a photograph or scanned copy of the letter.

Employer's instruction should come from a director, company secretary or someone authorised to act for and on behalf of the company.

Requirements

- See the [Pension Transfer Pathfinder](#) for full requirements

Pension Transfer Pathfinder

v0.190527



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[or view all documents as a list](#)

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Requirements

1. [Company Pension Retirement Claim Form](#)
2. Evidence of age (birth cert, passport or drivers licence)
3. For 20% Directors:
 - In all cases: evidence of highest three consecutive years salaries in 10 years prior to retirement / date of leaving service. This can be [Employment Detail Summary pdf](#) from Revenue's myAccount, P60 or letter from company accountant.
 - For early retirement claims: confirmation from company accountant that the director disposed of their shareholding.

Based on the member's chosen option at retirement

- [AMRF/ ARF Application Form](#)
- Evidence of guaranteed income or details of existing AMRF, if applicable
- [Annuity Application Form](#)

Early Retirement Note

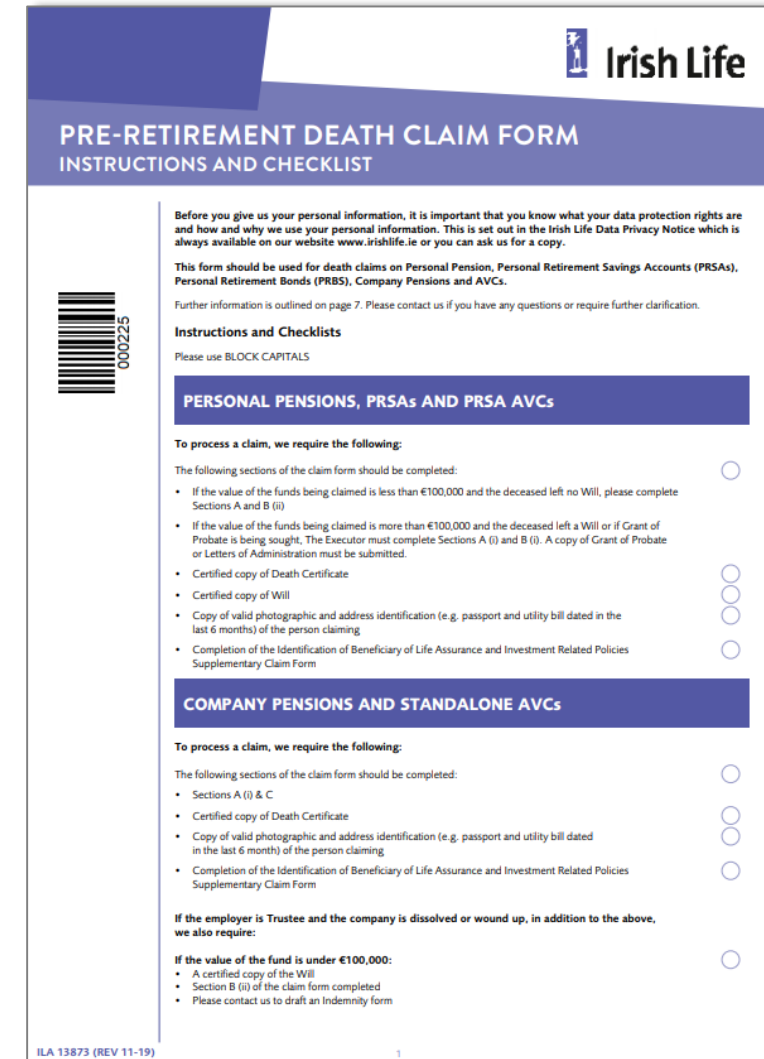
Early retirement is where benefits are taken before the normal retirement age of the scheme.

To take early retirement employment must cease and 20% directors must sever all links with the company and dispose of their shareholding.

If the member is aged 60+ the employer may agree to reduce the NRA to member's current age thereby allowing the member take retirement benefits at their normal retirement age.

Requirements

1. [Pre-Retirement Death Claim Form](#)
2. Copy of Death Certificate
3. Copy of Grant of Probate or Letters of Administration
4. Copy of Will if applicable
5. ID and evidence of address (within 6 months) for claimant



Irish Life

PRE-RETIREMENT DEATH CLAIM FORM INSTRUCTIONS AND CHECKLIST

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- If the value of the funds being claimed is more than €100,000 and the deceased left a Will or if Grant of Probate is being sought, The Executor must complete Sections A (i) and B (i). A copy of Grant of Probate or Letters of Administration must be submitted.
- Certified copy of Death Certificate
- Certified copy of Will
- Copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
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COMPANY PENSIONS AND STANDALONE AVCs

To process a claim, we require the following:

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- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

If the employer is Trustee and the company is dissolved or wound up, in addition to the above, we also require:

- A certified copy of the Will
- Section B (ii) of the claim form completed
- Please contact us to draft an Indemnity form

ILA 13873 (REV 11-19) 1

New Business

Fund Switches



Transfers Out

Retirement Claims

Death Claims

Requirements

- [PRB Application Form](#)
- For 20% Directors: Evidence of Salary
 - Evidence for at least three consecutive years
 - This can be [Employment Detail Summary pdf](#) from Revenue's myAccount, P60 or letter from company accountant for the required years.



COMPLETE SOLUTIONS PERSONAL RETIREMENT BOND APPLICATION FORM

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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.

Financial Adviser Details

Financial Adviser Name

Financial Adviser Code

Profile

If your Financial Broker or Adviser submits your application electronically Irish Life will only receive a copy of the Declarations section of this form. The original application form will be retained by your Financial Broker of Adviser and not checked by Irish Life.

1. Personal Details

Title (Mr/Mrs/Ms etc)

First Name Initial (if applicable)

Surname

Date of Birth (dd/mm/yyyy) Age Next Birthday

Gender Male Female

Relationship Status Single Married Widowed Separated
Divorced Registered Civil Partner

Country of Birth

Country of Nationality

Previous Surname (if any)

PPS Number

Occupation

Country of Residence

Are you resident in Ireland for tax purposes? Yes No

2. Contact Details

Address 1

Address 2

Address 3

County

Home Phone Number

Mobile Phone Number

Email Address (if applicable)

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We are obliged to establish country of birth and nationality to comply with anti-money laundering requirements.

PPS number should contain 7 digits and 1 or 2 letters

ILA 8993 (REV 11-19)

Fund Switch Requirements:

- Letter from client confirming fund switch details
 - This can be emailed to broker for onward email to Irish Life
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Requirements

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Requirements

1. [PRB Retirement Claim Form](#)
2. Evidence of age (birth cert, passport or drivers licence)
3. For 20% Directors:
 - If not provided when the PRB was set up: evidence of highest three consecutive years salaries in 10 years prior to retirement / date of leaving service. This can be [Employment Detail Summary pdf](#), P60 or letter from company accountant
 - For early retirement claims: confirmation from company accountant that the director disposed of their shareholding.

Based on the member's chosen option at retirement

- [AMRF/ ARF Application Form](#)
- Evidence of guaranteed income / existing AMRF if applicable
- [Annuity Application Form](#)

Early Retirement Note

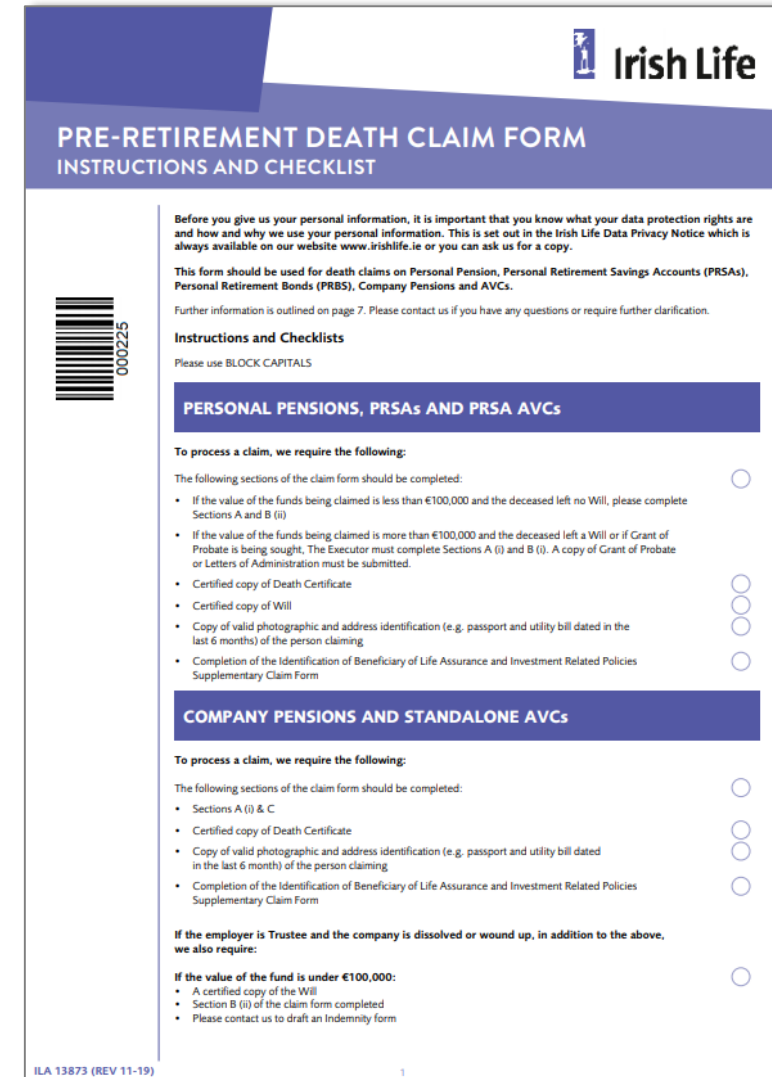
Early retirement is where benefits are taken before the normal retirement age of the original company pension scheme.

To take early retirement employment must cease and 20% directors must sever all links with the company and dispose of their shareholding.

The normal retirement age on a PRB must be the same as the original scheme, it cannot be changed.

Requirements

1. [Pre-Retirement Death Claim Form](#)
2. Copy of Death Certificate
3. Copy of Grant of Probate or Letters of Administration
4. Copy of Will if applicable
5. ID and evidence of address (within 6 months) for claimant



Irish Life

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COMPANY PENSIONS AND STANDALONE AVCs

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If the employer is Trustee and the company is dissolved or wound up, in addition to the above, we also require:

If the value of the fund is under €100,000:

- A certified copy of the Will
- Section B (ii) of the claim form completed
- Please contact us to draft an Indemnity form

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New Business

Fund Switches

Transfers

Income Withdrawals

**Converting an AMRF to an
ARF**

Death Claims

Requirements

- [AMRF / ARF Application Form](#)
- Evidence of guaranteed income or details of existing AMRF, if applicable


Payments that count towards the guaranteed income:

- Occupational Pension / Annuity Income
- Widow, Widower, Surviving Civil Partner Pension
- Invalidity Pension
- Blind Pension
- Living Alone Allowance
- Island Allowance

Payments that clients can opt to include

- Christmas Bonus
- Fuel Allowance
- Household Benefit Package
- Telephone Support Allowance

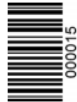
PENSIONS
INVESTMENTS
LIFE INSURANCE



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Financial Adviser Details

Financial Adviser Name

Financial Adviser Code Profile

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In completing this proposal form please note:
ARF/AMRF products are designed to allow you to control your pension fund and you can determine the rate at which you take withdrawals from the fund. However, depending on the investment return, the rate of withdrawals and how long you live in retirement, there is no guarantee that the fund will last for your lifetime. Before completing this application form please ensure you have read and understood the product booklet.

1. Member/Customer Details

Title (Mr/Mrs/Ms etc)

First Name Initial (if applicable)

Last Name

Date of Birth (dd/mm/yyyy) Age Next Birthday

Gender Male Female

Relationship Status Single Married Registered Civil Partner
Separated Divorced Widowed

Country of Birth

Nationality

Precise Occupation

PPS Number

We are obliged to establish your nationality to comply with anti-money/laundersing requirements

PPS number should contain 7 digits and 1 or 2 letters

ILA 4391 (REV 02-20)
1

Fund Switch Requirements:

- Letter from client confirming fund switch details
 - This can be emailed to broker for onward email to Irish Life
 - Irish Life will accept a photograph or scanned copy of written client's written instruction.

Requirements

- See the [Pension Transfer Pathfinder](#) for full requirements

Pension Transfer Pathfinder

v0.190527



In a few steps, this pathfinder tool will guide towards your requirements for transferring a pension into an existing or new Irish Life pension product.

Get an exact answer in just a few seconds.

[Get Started >](#)

[or view all documents as a list](#)

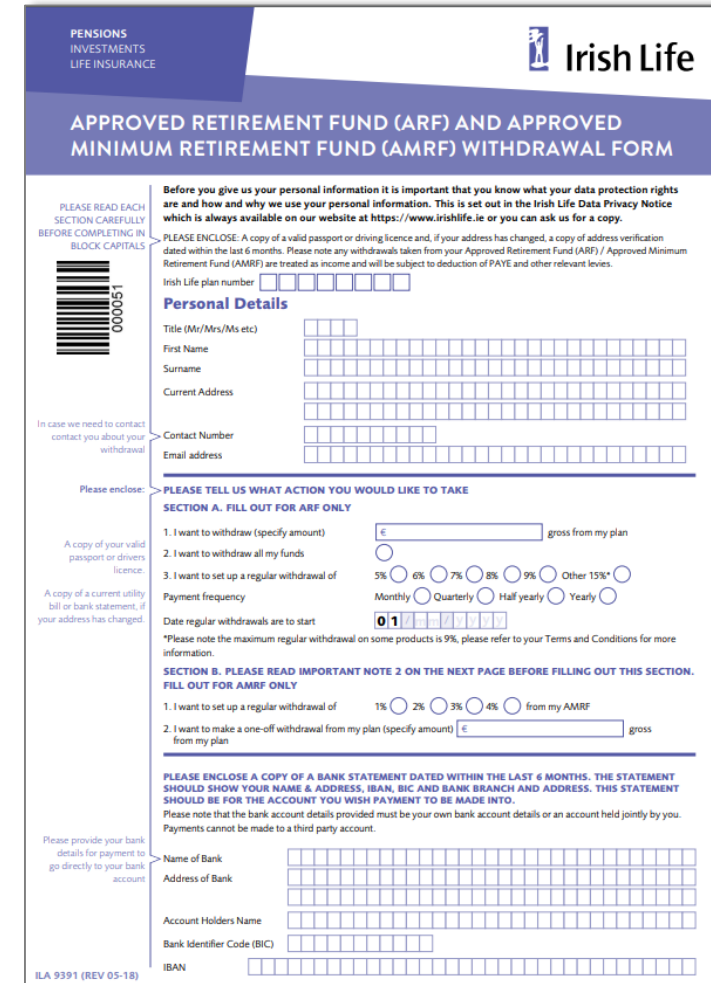
In all cases Irish Life may need to request further information from the transferring office. For more information please contact your Irish Life Account Manager.

Requirements

1. [ARF Withdrawal Form](#)
2. Proof of ID (passport or drivers licence)
3. Copy of bank statement dated within 6 months for the account client wants their withdrawals paid into, statement should show
 - Client name & address
 - Bank Branch & Address
 - IBAN & BIC

Note

The maximum withdrawal allowed from an AMRF is 4% of the fund value per year.



PENSIONS INVESTMENTS LIFE INSURANCE **Irish Life**

APPROVED RETIREMENT FUND (ARF) AND APPROVED MINIMUM RETIREMENT FUND (AMRF) WITHDRAWAL FORM

PLEASE READ EACH SECTION CAREFULLY BEFORE COMPLETING IN BLOCK CAPITALS

PLEASE ENCLOSE: A copy of a valid passport or driving licence and, if your address has changed, a copy of address verification dated within the last 6 months. Please note any withdrawals taken from your Approved Retirement Fund (ARF) / Approved Minimum Retirement Fund (AMRF) are treated as income and will be subject to deduction of PAYE and other relevant levies.

Irish Life plan number

Personal Details

Title (Mr/Mrs/Ms etc)

First Name

Surname

Current Address

Contact Number

Email address

PLEASE TELL US WHAT ACTION YOU WOULD LIKE TO TAKE

SECTION A. FILL OUT FOR ARF ONLY

1. I want to withdraw (specify amount) gross from my plan
 2. I want to withdraw all my funds
 3. I want to set up a regular withdrawal of 5% 6% 7% 8% 9% Other 15%*
 Payment frequency Monthly Quarterly Half yearly Yearly

Date regular withdrawals are to start

*Please note the maximum regular withdrawal on some products is 9%, please refer to your Terms and Conditions for more information.

SECTION B. PLEASE READ IMPORTANT NOTE 2 ON THE NEXT PAGE BEFORE FILLING OUT THIS SECTION. FILL OUT FOR AMRF ONLY

1. I want to set up a regular withdrawal of 1% 2% 3% 4% from my AMRF
 2. I want to make a one-off withdrawal from my plan (specify amount) gross from my plan

PLEASE ENCLOSE A COPY OF A BANK STATEMENT DATED WITHIN THE LAST 6 MONTHS. THE STATEMENT SHOULD SHOW YOUR NAME & ADDRESS, IBAN, BIC AND BANK BRANCH AND ADDRESS. THIS STATEMENT SHOULD BE FOR THE ACCOUNT YOU WISH PAYMENT TO BE MADE INTO.

Please note that the bank account details provided must be your own bank account details or an account held jointly by you. Payments cannot be made to a third party account.

Please provide your bank details for payment to go directly to your bank account

Name of Bank

Address of Bank

Account Holders Name

Bank Identifier Code (BIC)

IBAN

ILA 9391 (REV 05-18)

When does an AMRF become an ARF?

- When the client reaches age 75, or
- Starts to receive a guaranteed pension income of at least €12,700 a year.

Payments that count towards the guaranteed income:

- Occupational Pension / Annuity Income
- Widow, Widower, Surviving Civil Partner Pension
- Invalidity Pension
- Blind Pension
- Living Alone Allowance
- Island Allowance

Payments that clients can opt to include

- Christmas Bonus
- Fuel Allowance
- Household Benefit Package
- Telephone Support Allowance

Requirements where client meets guaranteed income

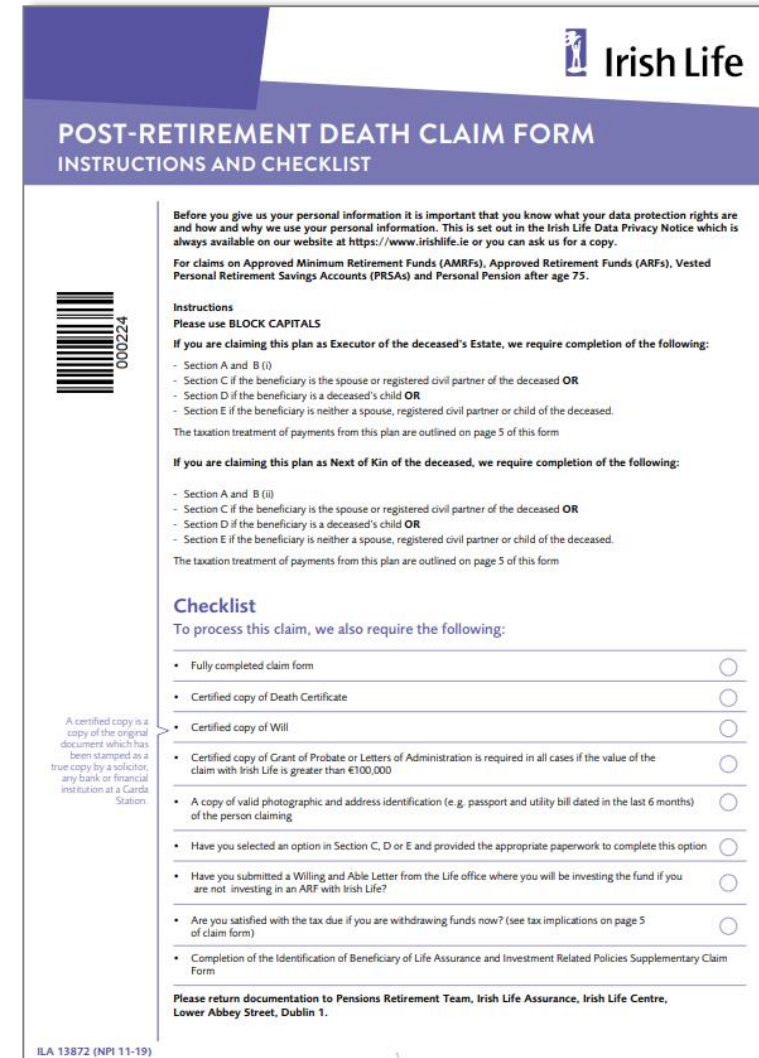
1. [AMRF Income Assessment Form](#)
2. Evidence of their pension income e.g. letter from Dept. of Social Protection, payslip from An Post, letter from annuity provider
3. Copy of bank statement dated within 6 months for the account client wants their withdrawals paid into, statement should show
 - Client name & address
 - Bank Branch & Address
 - IBAN & BIC
4. Photographic ID (passport or driving licence)

Requirements

1. [Post-Retirement Death Claim Form](#)
2. Copy of Death Certificate
3. Copy of Grant of Probate or Letters of Administration
4. Copy of Will if applicable
5. ID and evidence of address for claimant dated within the last 6 months

If an ARF is being set up for spouse of the deceased

- A fully completed [ARF Application Form](#)



Irish Life

POST-RETIREMENT DEATH CLAIM FORM INSTRUCTIONS AND CHECKLIST

Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at <https://www.irishlife.ie> or you can ask us for a copy.

For claims on Approved Minimum Retirement Funds (AMRFs), Approved Retirement Funds (ARFs), Vested Personal Retirement Savings Accounts (PRSAs) and Personal Pension after age 75.

Instructions
Please use **BLOCK CAPITALS**

If you are claiming this plan as Executor of the deceased's Estate, we require completion of the following:

- Section A and B (i)
- Section C if the beneficiary is the spouse or registered civil partner of the deceased **OR**
- Section D if the beneficiary is a deceased's child **OR**
- Section E if the beneficiary is neither a spouse, registered civil partner or child of the deceased.

The taxation treatment of payments from this plan are outlined on page 5 of this form

If you are claiming this plan as Next of Kin of the deceased, we require completion of the following:

- Section A and B (ii)
- Section C if the beneficiary is the spouse or registered civil partner of the deceased **OR**
- Section D if the beneficiary is a deceased's child **OR**
- Section E if the beneficiary is neither a spouse, registered civil partner or child of the deceased.

The taxation treatment of payments from this plan are outlined on page 5 of this form

Checklist
To process this claim, we also require the following:

- Fully completed claim form
- Certified copy of Death Certificate
- Certified copy of Will
- Certified copy of Grant of Probate or Letters of Administration is required in all cases if the value of the claim with Irish Life is greater than €100,000
- A copy of valid photographic and address identification (e.g. passport and utility bill dated in the last 6 months) of the person claiming
- Have you selected an option in Section C, D or E and provided the appropriate paperwork to complete this option
- Have you submitted a Willing and Able Letter from the Life office where you will be investing the fund if you are not investing in an ARF with Irish Life?
- Are you satisfied with the tax due if you are withdrawing funds now? (see tax implications on page 5 of claim form)
- Completion of the Identification of Beneficiary of Life Assurance and Investment Related Policies Supplementary Claim Form

Please return documentation to Pensions Retirement Team, Irish Life Assurance, Irish Life Centre, Lower Abbey Street, Dublin 1.

ILA 13872 (NPI 11-19)

**Completing Forms using
eSignatures**

Useful Contacts

**How to download evidence
of salary from Revenue's
myAccount**

**How to download
confirmation employment
ceased from Revenue's
myAccount**

Section 6: Completing Forms Using eSignature

The following pension forms can be completed using eSignature

New Business Application Forms

- [Company Pensions](#)
- [Personal Pensions](#)
- [PRSAs](#)
- [Personal Retirement Bonds](#)
- [AMRFs & ARFs](#)

Top Up Forms

- [Company Pensions](#)

Retirement Claim Forms

- [Personal Pensions & PRSAs](#)
- [Company Pensions & PRBs](#)

Transfer In Forms

- [Company Pension TV In](#)
- [Personal Pension TV In](#)
- [PRSA Transfer In](#)

Transfer Out Forms

- [Company Pension TV Out](#)
- [PRSA Transfer Out](#)
- [Personal Retirement Bond](#)
- [AVC Transfer Out](#)



To view our dedicated page on remote ways of working [CLICK HERE](#)

To view our repository of editable forms and underwriting questionnaires [CLICK HERE](#)

Please note:

- eSignatures can only be accepted if your client provides us with their contact number and email address. As part of our anti-fraud measures, we may use these details to verify clients' identity.
- Where eSignatures are used the audit trail or completion certificate should be included
- For company pensions eSignatures can only be used on the most up to date application form (dated 10/20 onwards. If using older application forms the letter of exchange cannot be completed using eSignature and either a wet signature or new application will be required.

We have a panel of seven eSignature providers



HELLOSIGN
a Dropbox Company



Useful Contact Details:

Broker Servicing

broker.servicing@irishlife.ie

Commissions Team

CommissionsTeam@irishlife.ie

Pensions New Business

- For new applications
- Top Ups
- Transfers In

PensionsNewBusiness@irishlife.ie

Pensions Existing Business

- For switch requests
- Premium reductions & holidays
- Paid Up requests

PensionExistingBusiness@irishlife.ie

Pension Retirement Team

- For Retirement Claims
- Death Claims
- Transfers Out

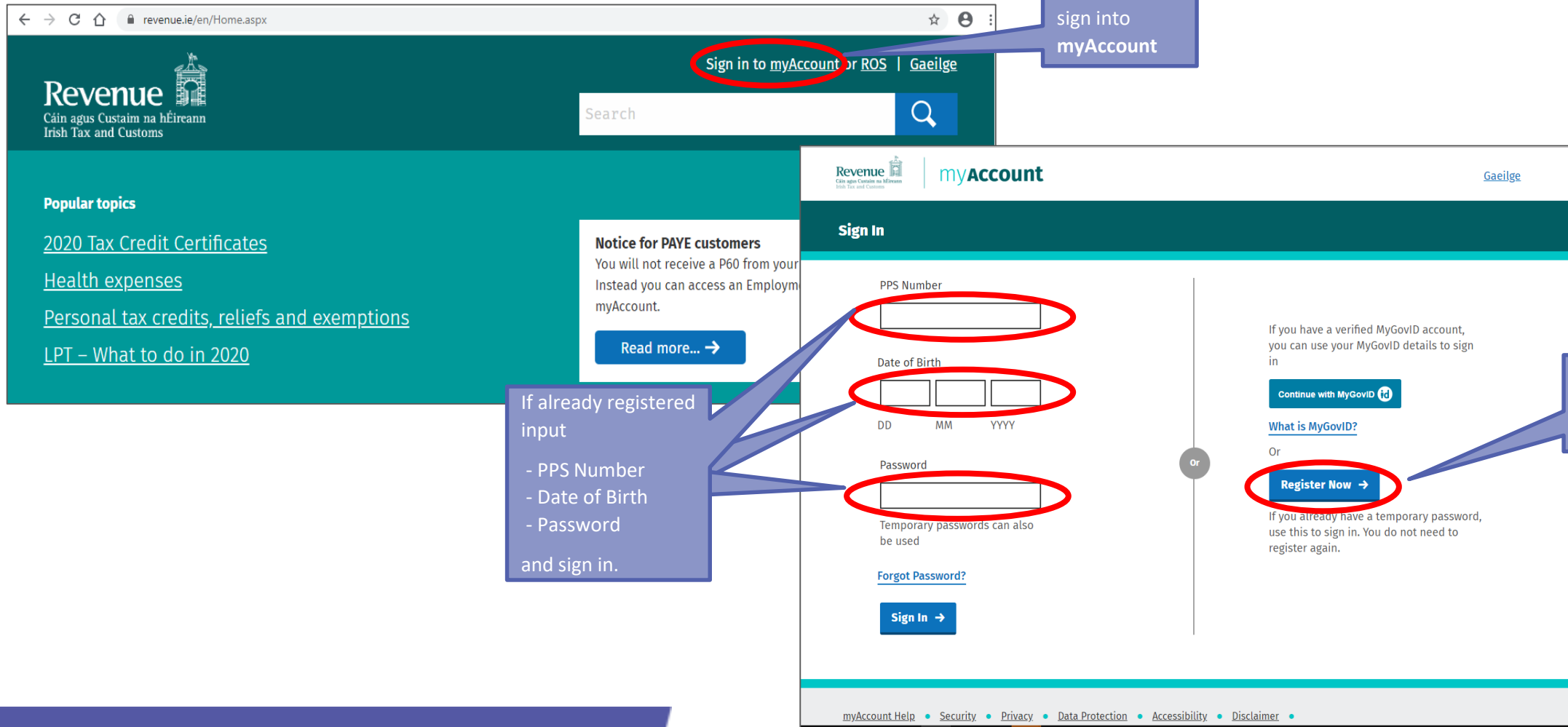
PensionsRetirementTeam@irishlife.ie

Underwriting

underwriting.help@irishlife.ie
[Ask Underwriting](#)

Company Pensions: Evidence of Salary

Clients can now download their own evidence of salary directly from www.revenue.ie



The screenshot shows the Revenue website's myAccount sign-in page. The main navigation bar includes the Revenue logo, a search bar, and a link to "Sign in to myAccount or ROS | Gaeilge". The page is divided into two main sections: "Sign In" and "Register Now".

Sign In Section:

- PPS Number: A text input field circled in red.
- Date of Birth: Three input fields for DD, MM, and YYYY, each circled in red.
- Password: A text input field circled in red.
- Buttons: "Forgot Password?", "Sign In →", and "Continue with MyGovID".

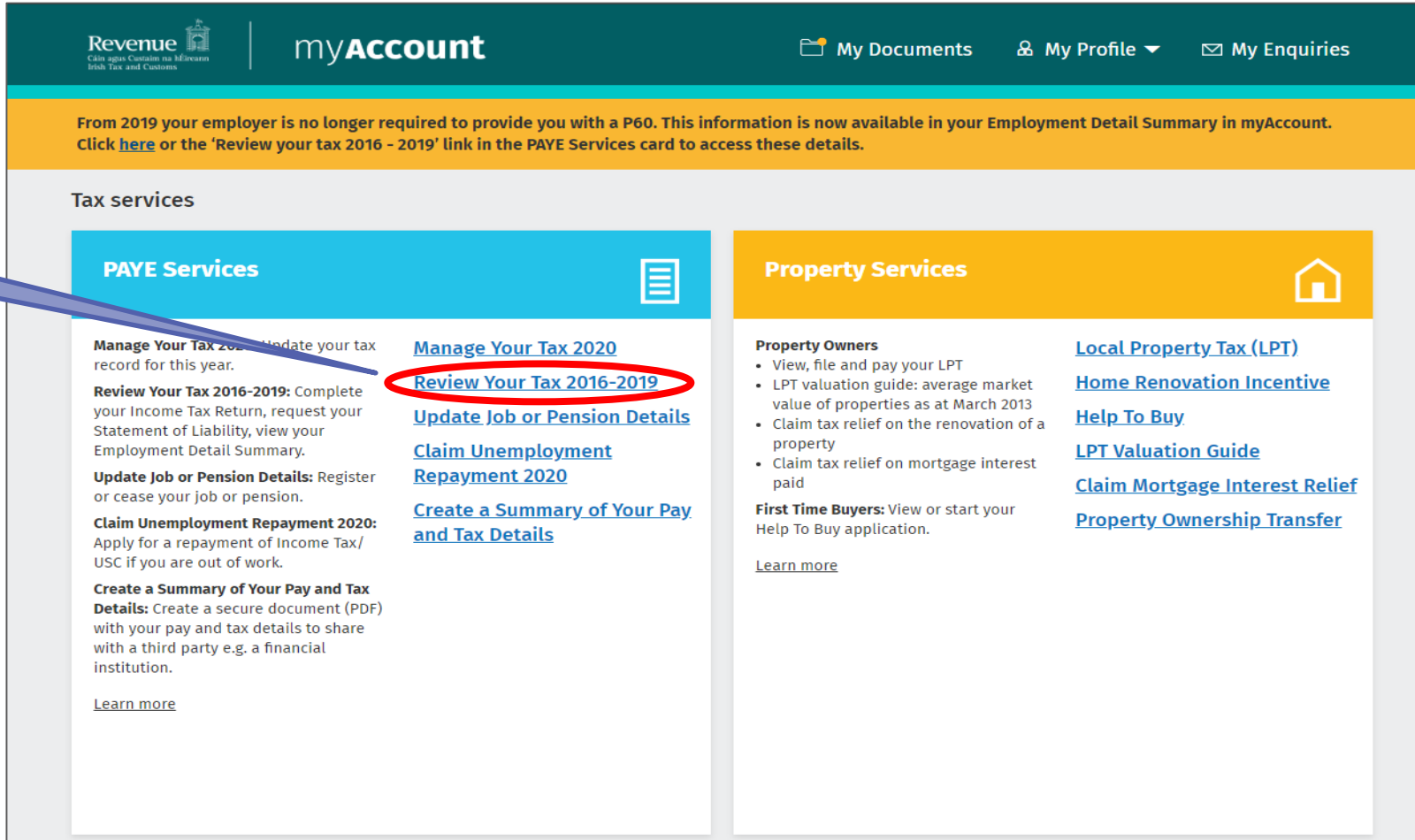
Register Now Section:

- Text: "If you have a verified MyGovID account, you can use your MyGovID details to sign in".
- Buttons: "Continue with MyGovID", "What is MyGovID?", "Or", and "Register Now →" (circled in red).
- Text: "If you already have a temporary password, use this to sign in. You do not need to register again."

Callouts:

- A callout points to the "Sign in to myAccount or ROS | Gaeilge" link with the text: "Click here to sign into myAccount".
- A callout points to the PPS Number, Date of Birth, and Password fields with the text: "If already registered input - PPS Number - Date of Birth - Password and sign in."
- A callout points to the "Register Now →" button with the text: "Click here to register for myAccount".

Footer: myAccount Help • Security • Privacy • Data Protection • Accessibility • Disclaimer



The screenshot shows the Revenue myAccount website. At the top, there is a navigation bar with the Revenue logo, the text 'myAccount', and links for 'My Documents', 'My Profile', and 'My Enquiries'. Below this is a yellow banner with a message about P60 forms. The main content area is divided into two columns: 'Tax services' and 'Property Services'. The 'Tax services' column has a blue header and contains several links, with 'Review Your Tax 2016-2019' circled in red. The 'Property Services' column has an orange header and contains links related to property taxes and incentives.

Revenue Clár agus Cúntaí na hÉireann Irish Tax and Customs | myAccount

My Documents My Profile My Enquiries

From 2019 your employer is no longer required to provide you with a P60. This information is now available in your Employment Detail Summary in myAccount. Click [here](#) or the 'Review your tax 2016 - 2019' link in the PAYE Services card to access these details.

Tax services

PAYE Services

Manage Your Tax 2020: Update your tax record for this year.

Review Your Tax 2016-2019: Complete your Income Tax Return, request your Statement of Liability, view your Employment Detail Summary.

Update Job or Pension Details: Register or cease your job or pension.

Claim Unemployment Repayment 2020: Apply for a repayment of Income Tax/ USC if you are out of work.

Create a Summary of Your Pay and Tax Details: Create a secure document (PDF) with your pay and tax details to share with a third party e.g. a financial institution.

[Learn more](#)

- [Manage Your Tax 2020](#)
- [Review Your Tax 2016-2019](#)
- [Update Job or Pension Details](#)
- [Claim Unemployment Repayment 2020](#)
- [Create a Summary of Your Pay and Tax Details](#)

Property Services

Property Owners

- View, file and pay your LPT
- LPT valuation guide: average market value of properties as at March 2013
- Claim tax relief on the renovation of a property
- Claim tax relief on mortgage interest paid

First Time Buyers: View or start your Help To Buy application.

[Learn more](#)

- [Local Property Tax \(LPT\)](#)
- [Home Renovation Incentive](#)
- [Help To Buy](#)
- [LPT Valuation Guide](#)
- [Claim Mortgage Interest Relief](#)
- [Property Ownership Transfer](#)

Click 'Review Your Tax'

Company Pensions: Evidence of Salary

Revenue Cain agus Custaim na hÉireann Irish Tax and Customs | Review your tax 2016 - 2019 | My Documents

← Back to myAccount

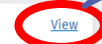
2019

Review type	Description	Status	Action
Statement of Liability	<ul style="list-style-type: none">Complete your Income Tax return to:<ul style="list-style-type: none">Change existing credits/declared income;Declare additional Income e.g. rental income, income from casual work;Claim additional credits/reliefs e.g. health expenses;Request your Statement of Liability from Revenue.	Available	Request
Employment Detail Summary ⓘ	<ul style="list-style-type: none">View a summary of the pay and tax details reported by your employer(s)/pension provider(s) to Revenue.Create a document containing a summary of your pay and tax details.	Available	View

2018

Review type	Description	Status
Income Tax Return	<ul style="list-style-type: none">Change existing credits/declared income;Declare additional Income e.g. rental income, income from casual work;Claim additional credits/reliefs e.g. health expenses;	Available
Statement of Liability	<ul style="list-style-type: none">Accept your end of year taxes without making changes to your existing credits/declared income	

Click 'View' in the Employment Detail Summary section for the tax year you want.



Revenue Cain agus Custaim na hÉireann Irish Tax and Customs | Employment Detail Summary | My Documents

← Back

Employment Detail Summary 2019

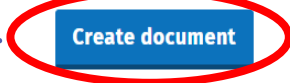
If any of this information is incorrect, please contact your employer/pension provider directly to have it corrected.

You can view each payroll submission by selecting 'View job/pension details'.

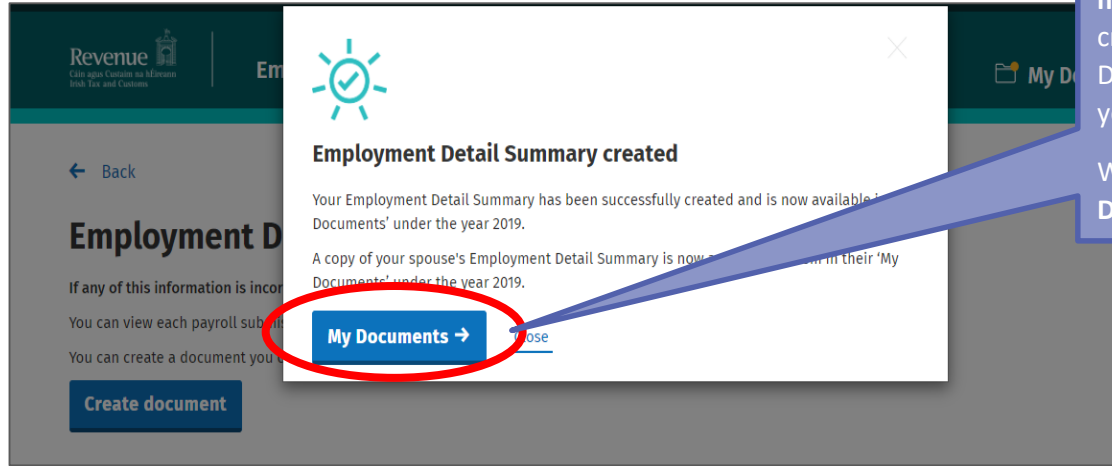
You can create a document you can save or print by clicking 'Create document'.

[Create document](#)

The first time you do this for a particular year you will be asked to 'Create document'



Company Pensions: Evidence of Salary



Revenue
Cúis agus Cúisín na hÉireann
Irish Tax and Customs

Employment

Employment Detail Summary created

Your Employment Detail Summary has been successfully created and is now available in your 'My Documents' under the year 2019.

A copy of your spouse's Employment Detail Summary is now available in their 'My Documents' under the year 2019.

[My Documents →](#) [Close](#)

← Back

Employment D

If any of this information is incor

You can view each payroll sub

You can create a document you

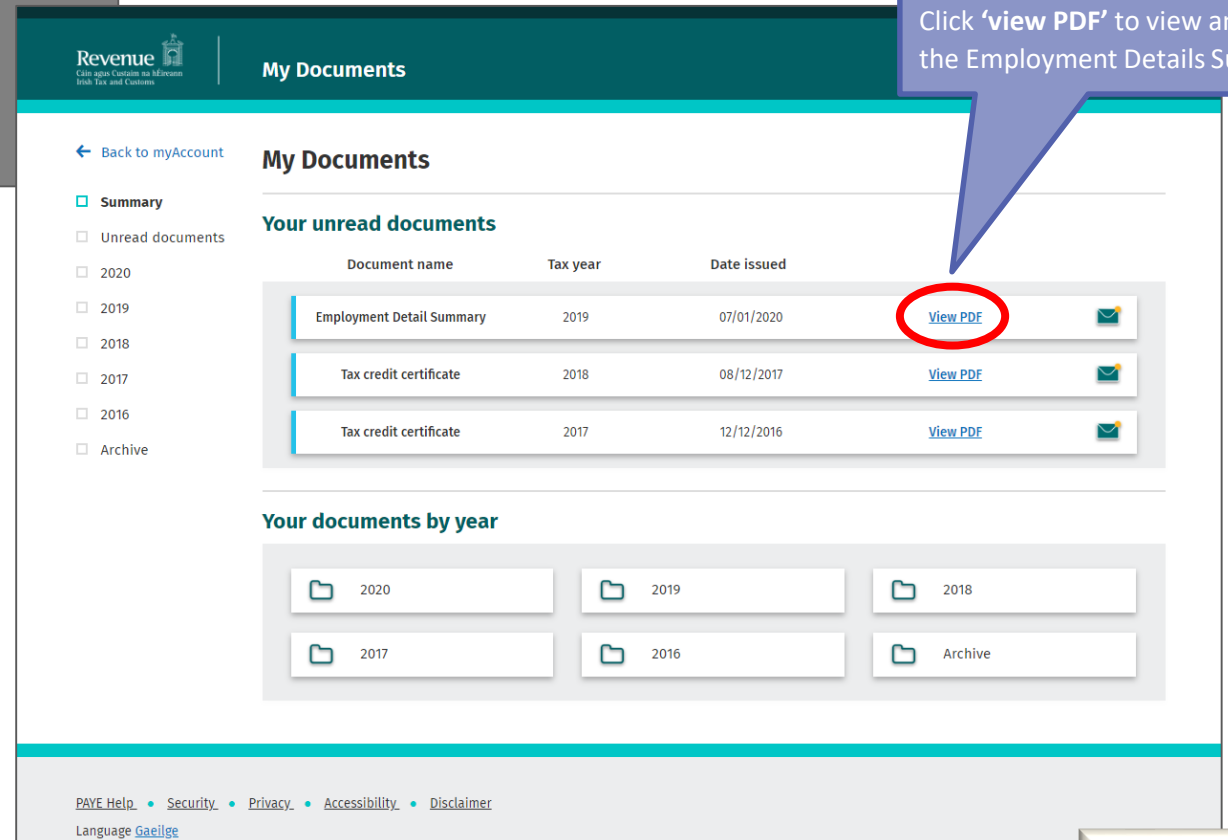
Create document

myAccount will then create an Employment Detail Summary for the year selected.

When done click 'My Documents'

The Employment Detail Summary will then be available in your unread documents section in the My Documents screen.

Click 'view PDF' to view and save the Employment Details Summary



Revenue
Cúis agus Cúisín na hÉireann
Irish Tax and Customs

My Documents

← Back to myAccount

My Documents

Summary

Unread documents

2020

2019




2018

2017


2016


Archive


Your unread documents


Document name	Tax year	Date issued	
Employment Detail Summary	2019	07/01/2020	View PDF 
Tax credit certificate	2018	08/12/2017	View PDF 
Tax credit certificate	2017	12/12/2016	View PDF 


Your documents by year


 2020

 2019

 2018

 2017

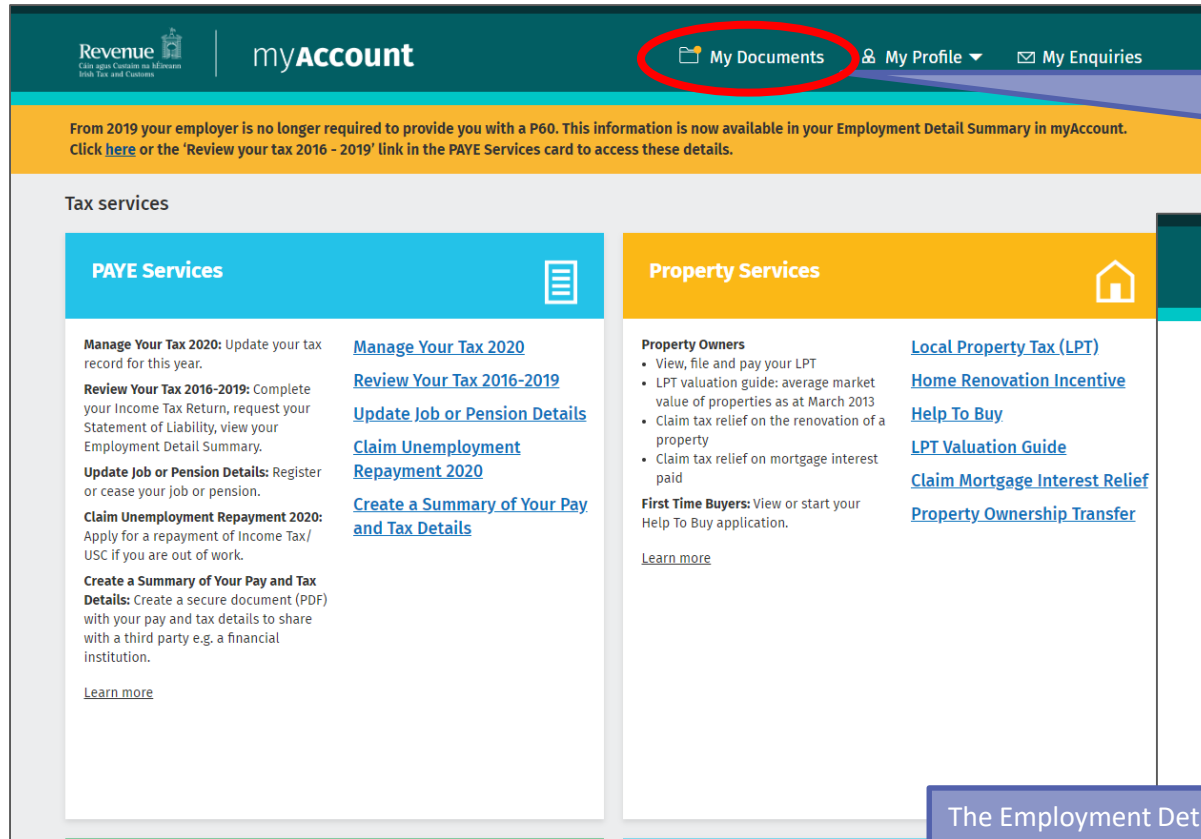
 2016

 Archive

PAYE Help • Security • Privacy • Accessibility • Disclaimer

Language [Gaeilge](#)

Company Pensions: Evidence of Salary



Revenue myAccount

My Documents My Profile My Enquiries

From 2019 your employer is no longer required to provide you with a P60. This information is now available in your Employment Detail Summary in myAccount. Click [here](#) or the 'Review your tax 2016 - 2019' link in the PAYE Services card to access these details.

Tax services

PAYE Services

- Manage Your Tax 2020:** Update your tax record for this year. [Manage Your Tax 2020](#)
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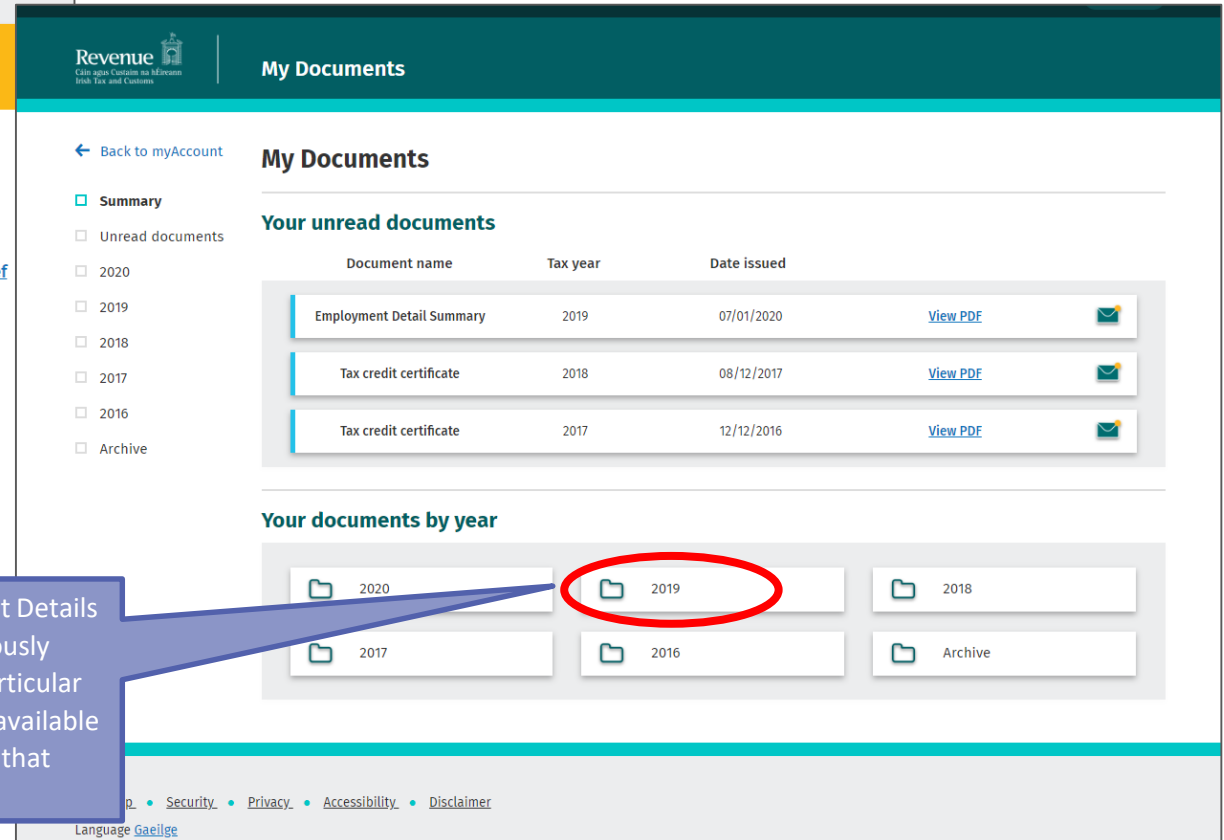
[Learn more](#)

Property Services

- Property Owners**
 - View, file and pay your LPT
 - LPT valuation guide: average market value of properties as at March 2013
 - Claim tax relief on the renovation of a property
 - Claim tax relief on mortgage interest paid
- First Time Buyers:** View or start your Help To Buy application. [Learn more](#)

- [Local Property Tax \(LPT\)](#)
- [Home Renovation Incentive](#)
- [Help To Buy](#)
- [LPT Valuation Guide](#)
- [Claim Mortgage Interest Relief](#)
- [Property Ownership Transfer](#)

To view an Employment Detail Summary already created click 'My Documents'



Revenue My Documents

Back to myAccount

My Documents

Your unread documents

Document name	Tax year	Date issued	
Employment Detail Summary	2019	07/01/2020	View PDF
Tax credit certificate	2018	08/12/2017	View PDF
Tax credit certificate	2017	12/12/2016	View PDF

Your documents by year

- 2020
- 2019
- 2018
- 2017
- 2016
- Archive

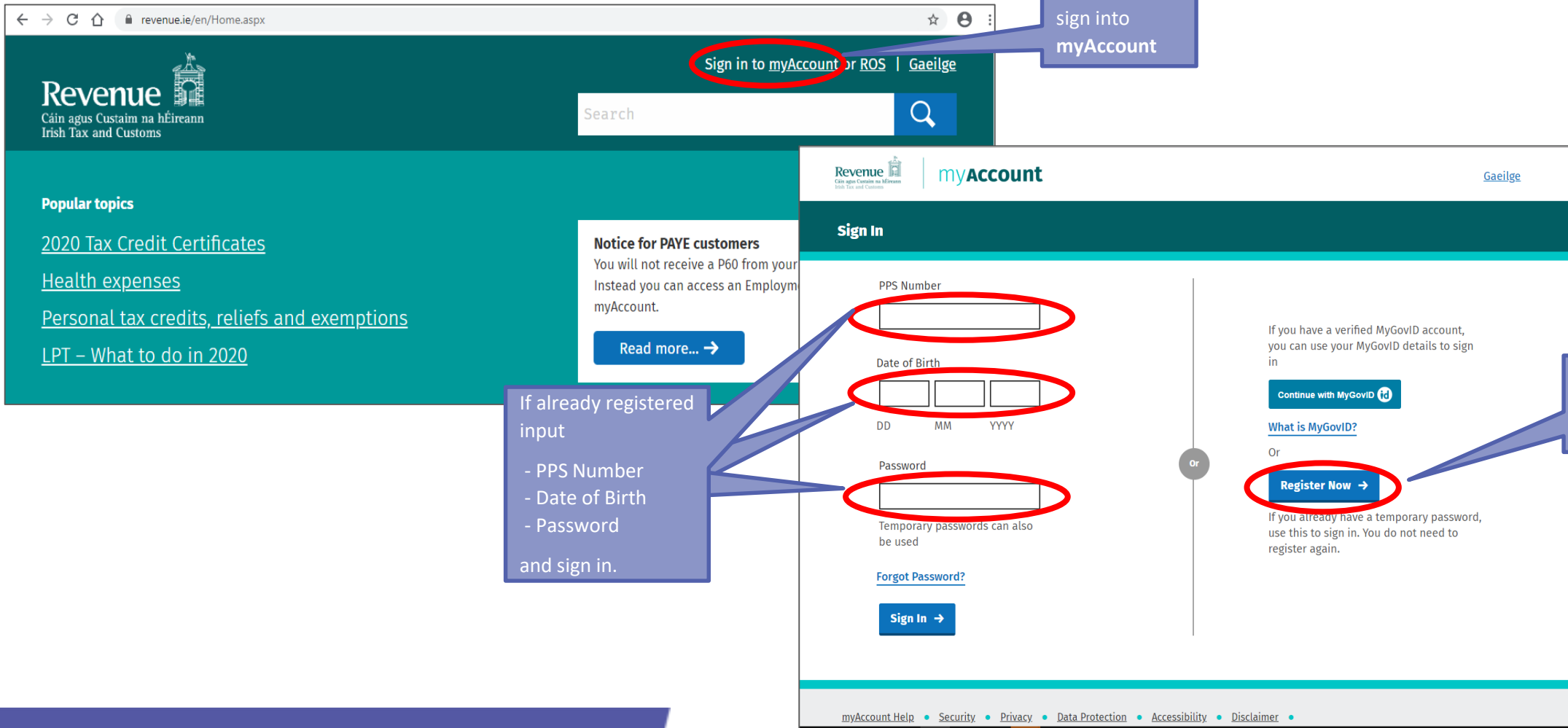
[Security](#) [Privacy](#) [Accessibility](#) [Disclaimer](#)

Language [Gaeilge](#)

The Employment Details Summary previously created for a particular tax year will be available in the folder for that year

Job Details Summary – P45 Replacement

Clients can now download their Job Details Summary directly from www.revenue.ie



revenue.ie/en/Home.aspx

Revenue
Cáin agus Custaim na hÉireann
Irish Tax and Customs

Search

Sign in to myAccount or ROS | Gaeilge

Popular topics

- [2020 Tax Credit Certificates](#)
- [Health expenses](#)
- [Personal tax credits, reliefs and exemptions](#)
- [LPT – What to do in 2020](#)

Notice for PAYE customers
You will not receive a P60 from your employer. Instead you can access an Employment Statement on myAccount.
[Read more... →](#)

myAccount

Sign In

PPS Number

Date of Birth
DD MM YYYY

Password
Temporary passwords can also be used

[Forgot Password?](#)

[Sign In →](#)

If you have a verified MyGovID account, you can use your MyGovID details to sign in

[Continue with MyGovID](#)

[What is MyGovID?](#)

Or

[Register Now →](#)

If you already have a temporary password, use this to sign in. You do not need to register again.

myAccount Help • Security • Privacy • Data Protection • Accessibility • Disclaimer

If already registered input

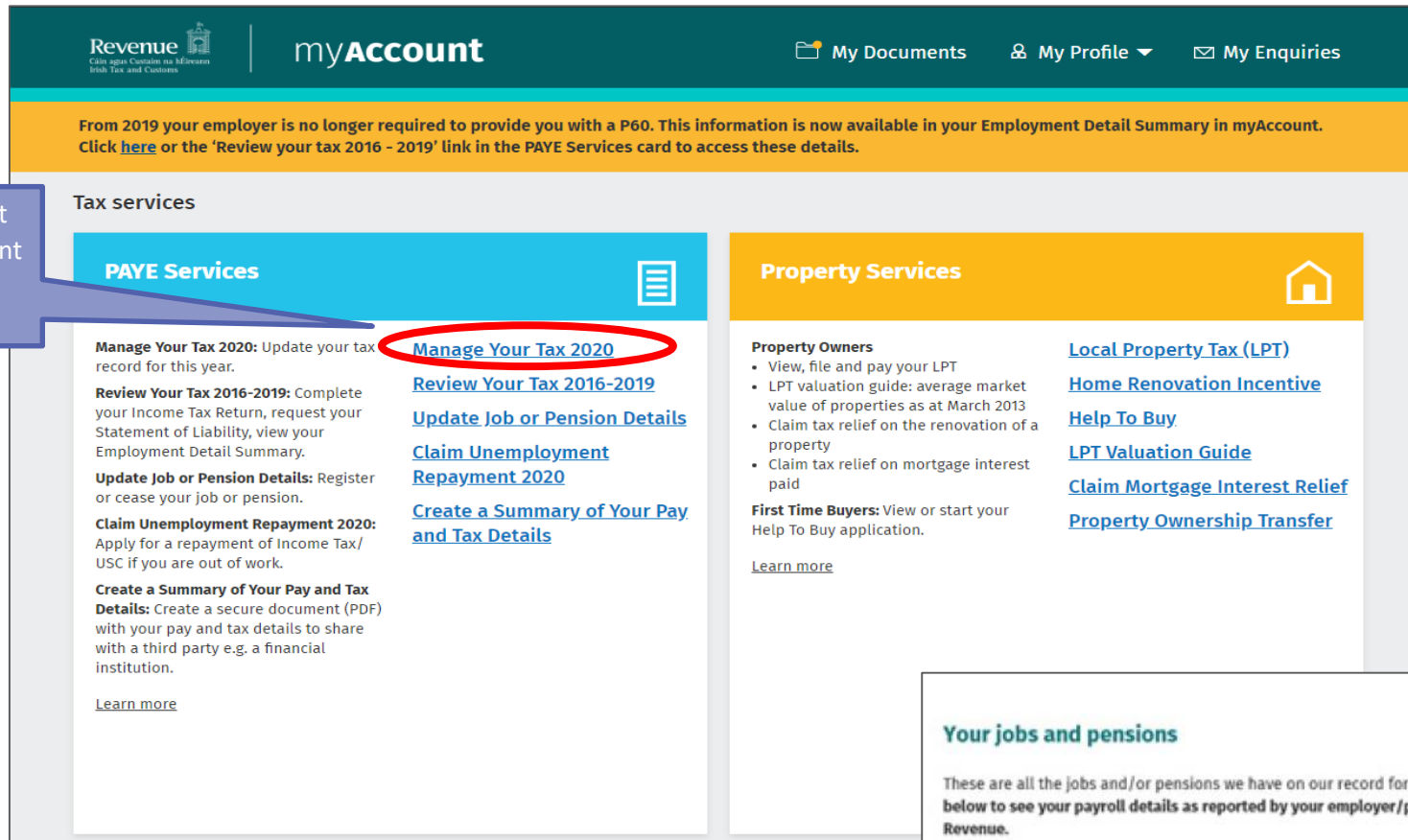
- PPS Number
- Date of Birth
- Password

and sign in.

Click here to sign into myAccount

Click here to register for myAccount

Job Details Summary – P45 Replacement



Revenue | myAccount | My Documents | My Profile | My Enquiries

From 2019 your employer is no longer required to provide you with a P60. This information is now available in your Employment Detail Summary in myAccount. Click [here](#) or the 'Review your tax 2016 - 2019' link in the PAYE Services card to access these details.

Tax services

PAYE Services

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Update Job or Pension Details: Register or cease your job or pension. [Update Job or Pension Details](#)

Claim Unemployment Repayment 2020: Apply for a repayment of Income Tax/ USC if you are out of work. [Claim Unemployment Repayment 2020](#)

Create a Summary of Your Pay and Tax Details: Create a secure document (PDF) with your pay and tax details to share with a third party e.g. a financial institution. [Create a Summary of Your Pay and Tax Details](#)

[Learn more](#)

Property Services

Property Owners

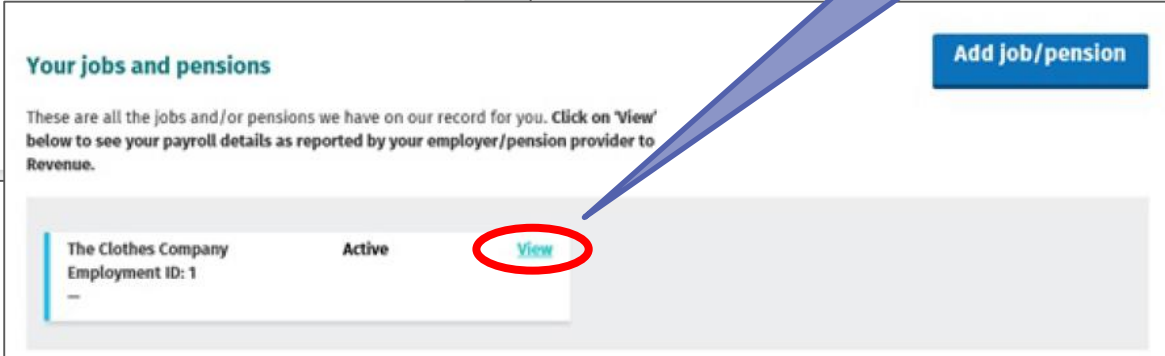
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- Claim tax relief on mortgage interest paid

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- [Local Property Tax \(LPT\)](#)
- [Home Renovation Incentive](#)
- [Help To Buy](#)
- [LPT Valuation Guide](#)
- [Claim Mortgage Interest Relief](#)
- [Property Ownership Transfer](#)

If your employment ceased in the current year click 'Manage Your Tax'

This will show the jobs and pensions on record for the year. Select 'View' for the relevant employment.

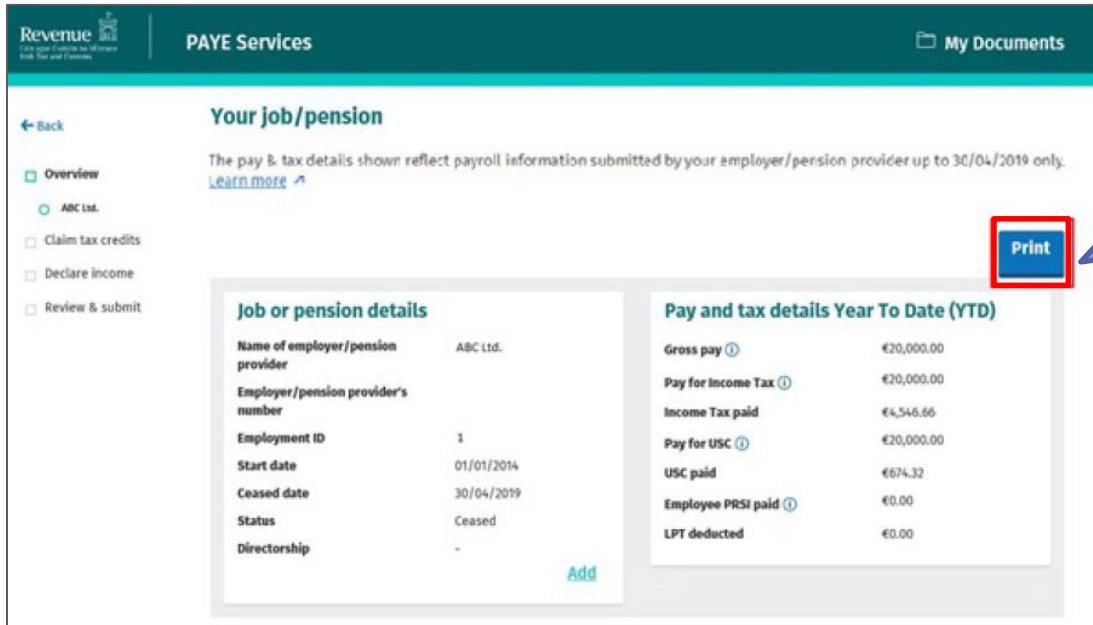


Your jobs and pensions [Add job/pension](#)

These are all the jobs and/or pensions we have on our record for you. Click on 'View' below to see your payroll details as reported by your employer/pension provider to Revenue.

The Clothes Company Employment ID: 1 —	Active	View
--	--------	----------------------

Job Details Summary – P45 Replacement



Revenue PAYE Services My Documents

← Back

Your job/pension

The pay & tax details shown reflect payroll information submitted by your employer/pension provider up to 30/04/2019 only. [Learn more](#)

Overview

- ABC Ltd.
- Claim tax credits
- Declare income
- Review & submit

Job or pension details

Name of employer/pension provider	ABC Ltd.
Employer/pension provider's number	
Employment ID	1
Start date	01/01/2014
Ceased date	30/04/2019
Status	Ceased
Directorship	-

Pay and tax details Year To Date (YTD)

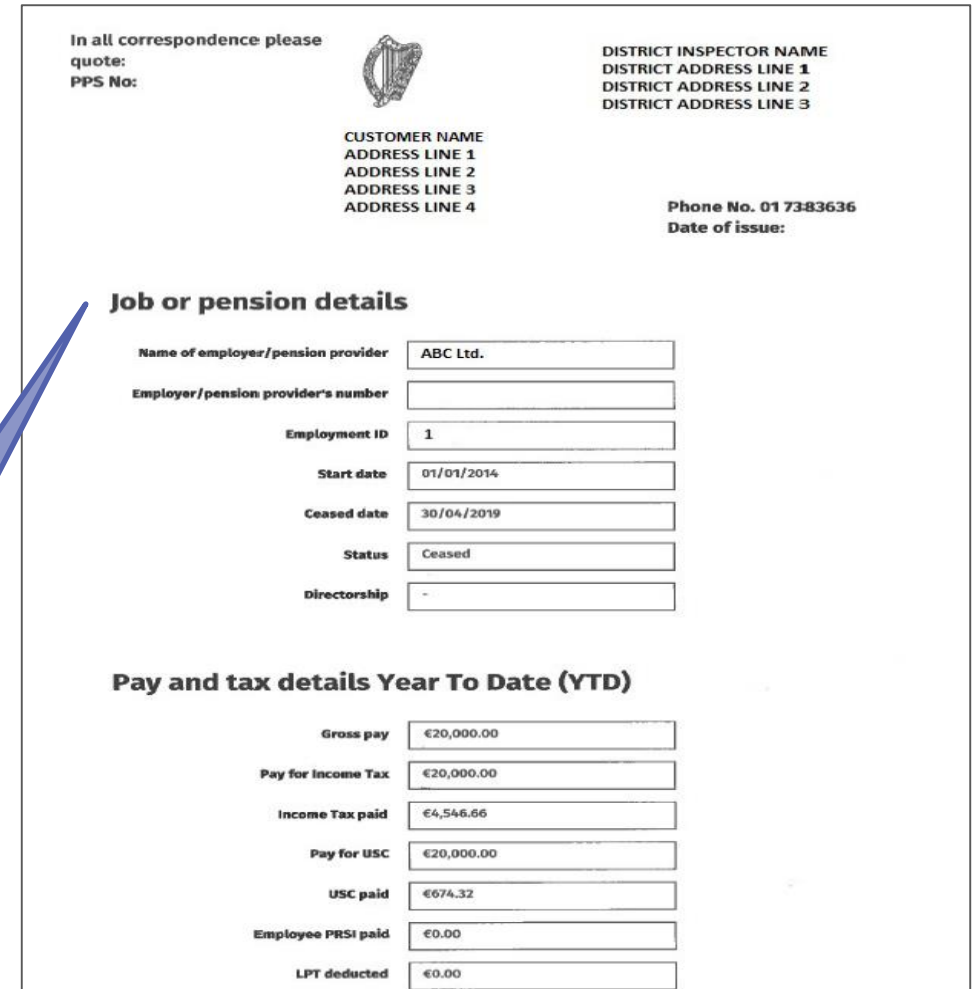
Gross pay	€20,000.00
Pay for Income Tax	€20,000.00
Income Tax paid	€4,546.66
Pay for USC	€20,000.00
USC paid	€674.32
Employee PRSI paid	€0.00
LPT deducted	€0.00

Print


This will show the jobs and pensions on record for the year.

Select 'View' for the relevant employment.

That will generate a Job or Pension Details Summary confirming the date employment ceased which can be downloaded and printed.



In all correspondence please quote:
PPS No:



DISTRICT INSPECTOR NAME
DISTRICT ADDRESS LINE 1
DISTRICT ADDRESS LINE 2
DISTRICT ADDRESS LINE 3

CUSTOMER NAME
ADDRESS LINE 1
ADDRESS LINE 2
ADDRESS LINE 3
ADDRESS LINE 4

Phone No. 01 7383636
Date of issue:

Job or pension details

Name of employer/pension provider: ABC Ltd.

Employer/pension provider's number: [input field]

Employment ID: 1

Start date: 01/01/2014

Ceased date: 30/04/2019

Status: Ceased

Directorship: -

Pay and tax details Year To Date (YTD)

Gross pay	€20,000.00
Pay for Income Tax	€20,000.00
Income Tax paid	€4,546.66
Pay for USC	€20,000.00
USC paid	€674.32
Employee PRSI paid	€0.00
LPT deducted	€0.00



The information contained in this document is based on the current Irish Life Retail process as at October 2020 and may change in the future.