

## Regular Savings

Regular Savings / Regular Savings with Single Premium



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**Important: This data capture form is NOT an application form and should not be sent to Zurich Life for input.** Information which you, the customer, provide in this form will be input by your Financial Advisor (on your behalf and with your authority) in an online application form. The information provided in the online application form will be relied upon by Zurich Life. **For Offline application, Child Savings, Corporate Saving or Single Premium only business, please refer to our standard application form.**

### Marketing Preferences

From time to time, we would like to contact you to keep you up to date with news and offers from Zurich Life and those of the Zurich Group or third parties that we recommend. If you are happy for us to do this, please choose how you would like us to contact you.

For news, updates and offers from Zurich Life by:

Post      Email      Phone      Text/Digital message

For news, updates and offers from the Zurich Group or third parties by:

Post      Email      Phone      Text/Digital message

If at any time you would like to change your preferences or remove your permission, all you need to do is contact us by phone on 01 799 2711, by email at customerservices@zurich.com, or by writing to Customer Services, Zurich Life Assurance plc, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin. Blackrock, FREEPOST, Co. Dublin.

### Plan Details

Policy Basis      Single      Joint

#### First Owner

First Name

Surname

Date of Birth

#### Second Owner

First Name

Surname

Date of Birth

### Contribution Details

#### Contribution Details

Policy Start Date      0 1

(i) Regular Contribution

For regular contributions payable by direct debit, we will collect the levy in addition to the regular contribution you specify. €

#### Frequency of payment

Monthly      Quarterly      Half-yearly      Yearly

**Note:** Cheque/Bank Draft/EFT payments are only available for half yearly/yearly payments

#### Method of payment

Direct Debit      Bank Draft      Cheque      EFT

(ii) Single Contribution

(the levy will be deducted from this amount) €

**Note:** For regular contributions payable by direct debit, we will collect the levy in addition to the regular contribution you specify. For regular contributions not paid by direct debit and for single contributions, we will deduct the levy from your payment before allocating it to your policy. As at June 2020, the levy is 1% and may change in the future.

### Office Use Only

RS Code / Structure

## Your Investment Options

1. Please specify in the table below the Funds in to which your **Regular Contribution** is to be invested.

You may choose to invest in a maximum of ten funds. If you wish to invest in a fund(s) that is not listed below, please use the 'Other Funds' box to detail your choice.

Fund Name	Regular Contribution
Prisma <b>2</b>	%
Prisma <b>3</b>	%
Prisma <b>4</b>	%
Prisma <b>5</b>	%
Prisma <b>Max</b>	%
<b>Other Funds</b> - please see the 'Fund Guide' on <a href="http://zurich.ie">zurich.ie</a> for a full list of available funds.	
	%
	%
	%
	%
	%
	%
<b>Total</b>	<b>100%</b>

**Note:** In addition to Zurich Life's normal Annual Management Charge (AMC) there is an extra AMC applicable on some funds. Please refer to individual fund factsheets on [zurich.ie](http://zurich.ie) for further information.

## Replacements

Does this policy replace an existing policy, in whole or in part?

Not a replacement       Replacement of Zurich Life policy       Replacement of other

If **Yes**, and that policy is a Zurich Life policy, please specify policy number:

## Policy Ownership

If you are **not** taking this plan out on your own behalf, please state the:

Name(s) of the other party(ies) on whose behalf you are taking out the policy

and their relationship or connection to you.

## Policy Sales

Was this policy sold, signed or completed outside Ireland?      Yes      No

## Trust

Is this application to be set up in trust?      Yes      No

## Web Access to Policy Information

You can look up details of your policy (including a daily updated value) online at the Client Centre on our website.

Do you wish to register for the Client Centre?      Yes      No

**Policy Owner Details First Owner**

Mr	Mrs	Ms	Forename			
Surname						
Marital Status	Married/Civil Partner	Single	Separated	Widow(er)	Divorced/Former Civil Partner	
Date of Birth				Sex	M	F
PPSN	A copy of the document used to verify the number must be uploaded.					
Residential Address						
Country of Residence						
Nationality						
Occupation						
Are you a politically Exposed Person (PEP)?	Yes		No			
Mobile Contact Number	Email address & Mobile contact number for each policy owner are compulsory as they will be used for the online approval process.					
Email Address						

**Certification of Tax Status**

1. Are you a United States citizen? Yes    No  
 If **Yes**, please confirm your social security number

2. Are you tax resident anywhere other than the Republic of Ireland? Yes    No  
**Note:** You may be tax resident in more than one jurisdiction.  
 If **Yes**, please complete the below:  
 Country of residence for tax purposes Tax identification number

**Policy Owner Details Second Owner**

Mr	Mrs	Ms	Forename			
Surname						
Marital Status	Married/Civil Partner	Single	Separated	Widow(er)	Divorced/Former Civil Partner	
Date of Birth				Sex	M	F
PPSN	A copy of the document used to verify the number must be uploaded.					
Residential Address						
Country of Residence						
Nationality						
Occupation						
Are you a politically Exposed Person (PEP)?	Yes		No			
Mobile Contact Number	Email address & Mobile contact number for each policy owner are compulsory as they will be used for the online approval process.					
Email Address						

**Policy Owner Details   Second Owner (continued)**

**Certification of Tax Status**

1. Are you a United States citizen? Yes      No

If **Yes**, please confirm your social security number

2. Are you tax resident anywhere other than the Republic of Ireland? Yes      No

**Note:** You may be tax resident in more than one jurisdiction.

If **Yes**, please complete the below:

Country of residence for tax purposes Tax identification number

**Regular Premium payment details**

Account Holder  
name

IBAN (International  
Bank Account Number)

Billing Date 1st 7th 15th If a billing date is not specified this will default to the 1st.

Is the payment from the Policy Owner(s) own bank account? Yes      No

If **No**, please provide the third party details below.

**Third party payor details (If applicable)**

**Note:** If policy is owned or paid by a company, please complete our Corporate Savings plan application form which is available on Zurich.ie

Forename

Surname

Sex M F

Residential  
Address

Country of  
Residence

Nationality

Relationship to  
policy holder

### Once off contribution details (If applicable)

Once off Contribution €

Is this to be treated as a Single Premium Injection in this application? Yes No

If **No**, please provide the RS Code/structure for the single premium (office use only)

Is the investment choice for the single premium the same as the regular premium? Yes No

If **No**, please complete your single premium investment choice below.

### Your once off contribution Investment Options (If applicable)

1. Please specify in the table below the Funds in to which your **Single Contribution** is to be invested.

2. Please tick here if you would like **AutoInvest** to apply to your policy.

**Important Note:** Autoinvest may only be selected if your single premium is being invested in a separate contract. For more information on AutoInvest, please visit Zurich.ie or speak to your Financial Broker.

If you choose **AutoInvest**, over what period do you wish to invest?

6 Months OR 12 Months

You may choose to invest in a maximum of ten funds. If you wish to invest in a fund(s) that is not listed below, please use the 'Other Funds' box to detail your choice.

Fund Name	Single Contribution
Prisma <b>2</b>	%
Prisma <b>3</b>	%
Prisma <b>4</b>	%
Prisma <b>5</b>	%
Prisma <b>Max</b>	%

**Other Funds** - please see the 'Fund Guide' on [zurich.ie](http://zurich.ie) for a full list of available funds.

	%
	%
	%
	%
	%
	%

**Total**

**100%**

For single contributions, units are bought at the ruling price on a date not later than three working days following receipt of the single contribution and the completed application form.

**Note:** In addition to Zurich Life's normal Annual Management Charge (AMC) there is an extra AMC applicable on some funds. Please refer to individual fund factsheets on [zurich.ie](http://zurich.ie) for further information.

### Source of funds – Once off contribution

Please confirm the payment method for the single premium contribution

Cheque      Bank Draft      Electronic Funds      Maturity of Funds

Other

Account Holder  
name

IBAN (International  
Bank Account Number)

Is the direct debit from the Policy Owner(s) bank account?      Yes      No

If payment of single premium is from the maturity of an existing policy please confirm:

Life insurance  
company

Policy number

### Source of Wealth (Regular and single premium)

**Note:** Only required when total annual premium and single premium is over 5k per annum.

#### First Owner

##### Where has the funding come from?

Please provide yearly income below (includes salary, pension or investment income).

Salary (including bonus)      €      per annum

Regular Savings

Inheritance

Property Sale

Early Retirement/Redundancy

Investment Proceeds

Other

Please specify.

#### Second Owner

##### Where has the funding come from?

Please provide yearly income below (includes salary, pension or investment income).

Salary (including bonus)      €      per annum

Regular Savings

Inheritance

Property Sale

Early Retirement/Redundancy

Investment Proceeds

Other

Please specify.

**Note:** Under the Criminal Justice (Money Laundering and Terrorist Financing) Acts, Zurich Life is required to obtain certain documentation and information about you, the method of payment being used and the origin of the funds used to pay the premium. Further information may subsequently be requested.

### Documentation Checklist

Under the Criminal Justice (Money Laundering and Terrorist Financing) Acts, Zurich Life is required to obtain certain information and documentation on our clients.\*

To facilitate this requirement, please tick the box to confirm you have attached the following documentation:

Please provide a copy of Proof of Address (e.g utility bill), dated within 6 months and certified by your Financial Advisor\*\* for each Policy Owner/Third Party Payor.

Please provide a copy of evidence of identity in the form of photo ID (e.g Passport/Driving Licence), which is in date with a clear photo and certified by your Financial Advisor for each Policy Owner/Third Party Payor.

Please provide a copy of the document used to verify PPSN.

For equivalent requirement(s) for entities please contact Zurich Life.\*

Other information or documentation may be required in certain circumstances and Zurich Life will advise you of these requirements when the application is submitted.

**Note:** \*Zurich Life is required to obtain information and documentation on the following individuals, where applicable: Policy Owner, Third Party Payors, Beneficiaries and Beneficial Owners.

**Note:** \*\*Documentation may also be certified by Practising Chartered & Certified Public Accountants, Notaries Public/Practising Solicitors, Embassy/Consular Staff, Regulated Financial or Credit Institutions, or their equivalents in other jurisdictions – these documents should be signed, dated, with a contact number and marked "Original Sighted".

### Zurich Life Assurance plc

Zurich House, Frascati Road, Blackrock, Co. Dublin, Ireland.  
Telephone: 01 283 1301 Fax: 01 283 1578 Website: www.zurich.ie

Zurich Life Assurance plc is regulated by the Central Bank of Ireland.

The information contained herein is based on Zurich Life's understanding of current Revenue practice as at June 2020 and may change in the future.

Intended for distribution within the Republic of Ireland.

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