ZURICH

Company Pensions from Zurich
DC/AVC Plan

Note: When you are providing personal information in relation to another party, please ensure that you have their consent to do so.

A Section Name

(Each employer or group of employers will have their own section within the Zurich Master Trust. The section name is typically the name of the Principal Employer).

B Your Personal Details

Mr ○ Mrs ○ Ms ○ Mx ○ Forename

Surname (The 'Employee')

Home Address

Date of Birth Sex M ○ F ○

Marital Status ○ Married/Civil Partner ○ Single ○ Separated ○ Widow(er) ○ Divorced/Former Civil Partner

Contact Number

Email Address

Country of Residence

Nationality

C Your employment details

Employee Number

Occupation

Annual Salary/Earnings €

PPSN

Start Date of this Employment

Month of First Contribution

Are you a 20% Director?* Yes ○ No ○

* '20% director' is someone who directly or indirectly at any time in the last three years owned or controlled more than 20% of the voting rights in the employer company, or in the parent company of the employer company.

D Contribution Details

Amount of Gross Regular Contribution

			% of Salary
Employer	€	OR	%
Employee	€	OR	%
AVC	€	OR	%
Total	€	OR	%

Amount of Once-off Contribution'

Employer	Employee
€	€
AVC	**Total**
€	€

' Does this once-off payment represent a transfer from another pension arrangement? Yes ○ No ○
If YES, please provide details. Also, if the transfer payment is the subject of a Pension Adjustment Order (PAO) please tick here ○ and supply a copy of the PAO.

E Your Investment Options

The default investment option of the Zurich Master Trust is Personalised GuidePath (with the Medium Risk/ Return growth stage, a retirement planning stage of 75% ARF and 25% Tax-free cash, and a strategy end age of the scheme NRA), as selected by the scheme Trustees, Zurich Ireland Master Trustee Designated Activity Company (ZIMT).

In addition to Personalised GuidePath there are a number of other default investment strategies which apply to certain sections of the Zurich Master Trust – these relate to schemes which were administered by Zurich Life prior to the launch of the Zurich Master Trust which have now transitioned into the Zurich Master Trust. If one of these default investment strategies applies to you this will be outlined on the scheme definitions in your new member pack. For further information on these alternative default investment strategies please visit www.zurich.ie/corporate.

As a member of the Zurich Master Trust you will be automatically invested in the default investment option which applies to your section. Where your default is Personalised GuidePath, you will then have the option to personalise your GuidePath via your online dashboard. If you personalise your GuidePath you are no longer invested in the scheme default.

Members also have the option of investing outside of the default investment option. If you do wish to invest outside the default option, you can do so by completing and returning an investment decision form. This form will be provided to you with your new member welcome pack. Please refer to the "Fund Guide" on www.zurich.ie/corporate for more details of the options available.

F Employee's Declaration

Part A
Data Protection Notice

Zurich Life Assurance plc ('Zurich Life', 'we', 'our') is a member of Zurich Insurance Group ('the Group'). Zurich Life is the data controller for this contract under data protection legislation. Our Data Protection Notice ('Notice') for this product is detailed at the end of this form. Please read this carefully.

By signing this form I confirm that I have read and understood the Data Protection Notice.

I authorise the Department of Employment Affairs and Social Protection or the Revenue Commissioners to advise Zurich Life of my most recent address on their records at any future time.

Part B

I have read the product information provided in respect of the Plan.
I understand that I have a duty to answer all questions asked by Zurich Life in this application honestly and with reasonable care and failure to comply with these requirements could result in my benefits being reduced to the extent (if any) permitted by the scheme rules or by the Pensions Act 1990, as amended. I declare that all questions and statements in this application are answered honestly and with reasonable care (including any statements written down at my dictation).

I acknowledge that in order to administer my benefits, it may be necessary for Zurich Life or the Trustee to seek information and benefit details from the administrator, trustees or other relevant insurance office of any scheme, arrangement or contract of which I am or have been a member, and I authorise the giving of such information and details.

If any of your pension entitlements are in a pension arrangement or IORP in a jurisdiction other than Ireland, insert the name of the country where the pension arrangement or IORP is located:

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

Employee: Please sign and date.

Signature of Employee
X

Date

Part C
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.

F Employee's Declaration (continued)

Part D

A person is not an 'Outgoing Worker' if their most recent employment was in Ireland AND their current employment is in Ireland. A person is an 'Ongoing Worker' where:

Prior to their current employment, their most recent employment was in another EU Member State; or Norway, Iceland or Liechtenstein and whilst in that employment they were an active member of a supplementary pension scheme.

OR

Having left employment as a member of a supplementary pension scheme, they commence employment in another EU Member State; or Norway, Iceland or Liechtenstein.

Outgoing Worker Declaration

Was your most recent employment in another EU Member State, Norway, Iceland or Liechtenstein? ○ Yes ○ No

Were you an active member of an occupational pension scheme/IORP in that employment? ○ Yes ○ No

G Nomination Form (do not detach)

I request that the Trustee considers paying or applying any lump sum payable on my death in service to or for the benefit of the following persons in the following proportions:

Note: To be completed by Employee.

Please use BLOCK CAPITALS.

Name	Relationship, if any (wife, father, sister, etc.)	Address	Proportion (%)

The people specified might include your spouse, your relatives, people who are financially dependent on you, and people mentioned in your will. You may, however, specify anyone you wish. People who receive lump sum benefits on your death may have to pay tax. More information on this tax can be obtained from the Revenue.

If your circumstances change, for example if you get married, you should consider if you wish to obtain and fill in a replacement form.

The Trustee is not bound by the preferences that you indicate on this form, and the Rules of the Plan allow for the Trustee to dispose of the lump sum in a different manner.

This notification replaces any former notification that I have issued to the Trustee.

Full Name (Print):

Employee: Please sign and date.

Signature of Employee

X

Date

Data Protection Notice

About this Notice
Everyone has rights with regard to the way in which their personal data is handled. During the course of our activities we will collect, store and process personal data about you. The purpose of this Notice is to set out some information on the collection and processing of your personal data. Further information can be obtained in our Privacy Statement which is available at www.zurich.ie/privacy-statement.

The Data we collect
We collect the following personal data ('Data') from you (unless you are a member of a group scheme, in which case we may collect the Data from your employer or the trustee of the scheme):

- Contact and identifying information such as title, name, address, email, telephone number, gender, marital status, date of birth, occupation, PPS number, nationality, country of residence and photographic identification. We require this Data to identify you, contact you, conduct a suitability assessment (in the event of a sale via a financial advisor employed by or tied to Zurich Life), to fulfil our contract with you and to comply with legal obligations (e.g. performance of anti-money laundering checks). For investment products we also collect your US citizen status and your Tax Identification Numbers from other countries (if applicable) which we require to comply with Revenue law. If you are a member of a group scheme, we may also collect your employer's details.
- Financial information such as bank details, credit/debit card details (where needed) and income details (where applicable). We require this Data so we can assess the premium to be paid, to fulfil our contract with you and to comply with legal obligations.
- Medical condition and health status for protection products and some pension and investment products which also offer life and serious illness benefits, we collect medical information relating to: personal habits (e.g. smoking or consumption of alcohol), prescription information and medical history. For pension products we may collect disability information (e.g. if you apply for an early retirement due to ill health). We require this Data so that we can fulfil our contract with you.
- Other sensitive information - in certain cases, we may receive sensitive information from which it may be possible to infer your trade union membership, religious or political beliefs (e.g. if you are a member of a group scheme through a professional, trade, religious, community or political organisation). In addition, we may obtain information about your criminal record or civil litigation history in the process of preventing, detecting and investigating fraud. We may obtain your PEP (politically exposed person) status, which is necessary for compliance with anti-money laundering legislation.

Data collected from third parties
We may collect Data from third parties if you engage with us through a third party e.g. through a financial broker/advisor or, in the case of a group scheme, through your employer. We do this in order to fulfil our contract and provide services to you. We may also obtain Data from third parties so that we can assess a claim.

What do we do with your Data?
We collect and process this Data to manage and administer our relationship with you. We may use, process and store the Data, for the following purposes:

- Risk evaluation, product suitability, statement execution, premium setting, premium collection, claims assessment, claims processing, claims payment, to provide annual statements, to create trustee annual reports (in the context of group schemes), for statistical evaluation, for survey purposes or to otherwise ensure the Group service delivery. Zurich Life or other members of the Group may contact you in connection with these purposes. We do this in order to provide you with the services for which you have contracted with us.
- We may check the Data you have provided against international/economic or financial sanctions laws or regulated listings to comply with legal obligations (e.g. anti-fraud and anti-money laundering requirements) or otherwise to protect our legitimate interests and/or the legitimate interests of others.

Sharing of Data
In order to provide a seamless service, we may share your Data (where appropriate):

- With other companies in the Group such as branches, subsidiaries, affiliates within the Group, partners of the Group, coinsurance and reinsurance companies located in Ireland and abroad, including outside the European Economic Area ('EEA').
- If you apply for, or purchase, one of our products through a financial broker/advisor or another third party (e.g. your employer if you are a member of a group scheme), we will, as appropriate, correspond with that third party in relation to your products: this may result in us sharing your Data with that third party.
- Without your consent or without consulting you, when we believe that it is appropriate to comply with our legal obligations, a Court Order or to cooperate with State bodies (e.g. Revenue, the Central Bank, The Pensions Authority and law enforcement agencies).
- On the sale, transfer or reorganisation of our or our Group's business (or any part of it).
- With business partners, suppliers and sub-contractors with whom we work and/or engage (e.g. auditors, cloud service providers, medical professionals, third-party claim administrators and outsourced service providers) to assist us in carrying out business activities which are in our legitimate business interest and where such interests are not overridden by your interests.
- In order to enforce this Notice or other legal rights, to protect the security and safety of others, and to prevent fraud.

For further information with respect to the third parties that we may share Data with, please see our Privacy Statement which is available at www.zurich.ie/privacy-statement.

Continued overleaf

Data Protection Notice (continued)

Where transfers of Data take place outside the European Economic Area ("EEA"), we ensure that they are undertaken lawfully and in accordance with appropriate safeguards. Data may be transferred to, and stored outside the European Union ("EU") or EEA and in a country for which there is no adequacy decision relating to the safeguards for Personal Data from the European Commission. In such instances, appropriate safeguards are put in place to protect your Data. For further information with respect to the non-EU or non-EEA countries to which your Data may be transferred and for which there is no adequacy decision relating to the safeguards for Personal Data from the European Commission or for a copy of the safeguards put in place to protect your Data, please see our Privacy Statement which is available at www.zurich.ie/privacy-statement.

If you have any questions about your Data, you can contact our Data Protection Officer, free of charge, using the contact details below.

Marketing
Depending on the marketing preferences you have expressed in any application forms for our products or services, we may send you details of offers and news that we would like to share with you. Please note that you have the right to change your preferences at any time by contacting 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.

Data Retention
The time periods for which we retain your Data depend on the purposes for which we use it. We will keep your Data for no longer than is required or permitted. For more detail, see our Data Retention Policy at www.zurich.ie/privacy-statement.

Data Subject Rights
You have the following rights in relation to your Data which is held by Zurich Life:

1. To ask for details of your Data held by us.
2. To ask for a copy of your Data.
3. To have any inaccurate or misleading Data rectified.
4. To have your Data erased.
5. To restrict the processing of your Data in certain circumstances.
6. To object to the processing of your Data.
7. To transfer your Data to a third party.
8. A right not to be subject to automated decision making.
9. The right to receive notification of a Data breach.
10. Where processing is based on consent, the right to withdraw such consent.
11. The right to lodge a complaint to the Data Protection Commission.

If you wish to avail of these rights, a request must be submitted in writing to our Data Protection Officer. In order to protect your privacy, you may be asked to provide suitable proof of identification before we can process your request.

Our Data Protection Officer is contactable by phone, email, or post via:

- Zurich Life Customer Services on 01 799 2711
- dataprotectionofficer@zurich.ie
- Data Protection Officer, Zurich Life, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin.

Privacy Statement
Please note that this Notice is not a stand-alone document and should be reviewed in conjunction with our Privacy Statement which is available at www.zurich.ie/privacy-statement.

Zurich Ireland Master Trustee Designated Activity Company - Data Protection Notice

Zurich Ireland Master Trustee Designated Activity Company is the trustee ('Trustee') of your pension scheme ('Scheme') and is a member of the Zurich Insurance Group (the 'Group'). Under the General Data Protection Regulation ('GDPR') the Trustee, as data controller, is required to notify you of the following information regarding the collection, holding, use, disclosure and transfer (collectively known as 'processing') of personal information (or data) relating to you.

Personal information collected about you
In addition to any information supplied by you, personal information about you may be obtained from other sources, such as the Group and where applicable, any former pension scheme or employer of yours.

The information may include such things as dates of birth and earnings (in order to calculate benefits and contributions) and bank account details (in order to pay pensions). Other personal information may be held, such as a member's wishes with regard to the distribution of any lump sum death benefit. If health or other sensitive information is to be processed, you will be contacted separately.

Use of personal information
Under the GDPR the Trustee is permitted to process personal information to administer the Scheme to provide associated benefits and generally to fulfil its legal and regulatory obligations. It may also process personal information in connection with legal proceedings or disputes or where it has some other legitimate interest in doing so; e.g., members' personal information may help the Trustee and its advisers derive an appropriate default investment strategy or range of investment options.

Disclosure of personal information
Personal information may be transferred to and processed by Zurich Life Assurance plc ('Zurich Life') in its capacity as: (i) insurer; (ii) administrator of the Scheme; and (iii) Registered Administrator, and by other third parties and contractors involved in the running of the Scheme for the purposes of the Scheme or the business of the Group as it relates to the Scheme. These include service providers who carry out administration functions, insurance intermediaries, actuaries,

Continued overleaf

Zurich Ireland Master Trustee Designated Activity Company - Data Protection Notice (continued)

investment managers who carry out periodic reviews of the Scheme's investment options and strategies, the Scheme auditor (if relevant) and other professional advisors' who are retained to advise on the Scheme. Also, the Group's computer systems are used for Scheme purposes and so personal information will be stored on them. The Group and other third parties and contractors will be subject to confidentiality requirements under which they may only access and process personal information as described in this notice.

Personal information may also be transferred to others where they have a legitimate interest in processing it or the Trustee is required by law to provide the information, including: :

- Group companies (e.g. to provide administration, investment or actuarial support);
- any buyer or prospective buyer of the Trustee or another Group company involved in the running of the Scheme, including Zurich Life;
- other pension schemes and insurance companies to whom transfer payments may be made or benefits secured; and
- Revenue, the Pensions Authority and other statutory bodies..

Retention of personal information
In the main the personal information obtained will be retained for 7 years after the wind up of the Scheme as benefit claims and queries may be made at any time, but any details which the Trustee considers need no longer be retained will be erased.

Transfers of personal information outside Ireland
The personal information that is collected may be transferred to, and stored in, Switzerland, which is outside the European Economic Area ('EEA') and for which there is an adequacy decision relating to the safeguards for personal data from the European Commission.

The personal information may also be transferred to, and stored in India, which is outside the EEA and for which there is no adequacy decision relating to the safeguards for personal data from the European Commission. Accordingly, appropriate safeguards have been put in place to protect personal information and you may obtain a copy of these safeguards by contacting the Trustee's Data Protection Officer at dataprotectionofficer@zurich.ie or by telephoning the Customer Services team on 01 799 2711.

Your rights
You have a number of rights in relation to the personal information which is held about you, including:

- the right to see the personal information and to be provided with details regarding the processing of it;
- the right to have the personal information rectified if it is inaccurate or incomplete;
- the right to request that the personal information is erased or, in certain circumstances, to object to it being processed or to request that its processing is restricted. Please note however that any exercise of these rights will not be binding on the Trustee insofar as the Trustee is entitled to retain and process the information. Please also note that if you fail to provide accurate personal information or object to the processing of information this may result in a delay or an inability to process a claim for benefits under the Scheme; and
- the right to complain to the data protection commission, which may be contacted via its website at info@dataprotection.ie.

If you wish to avail of these rights, a request must be submitted in writing to the Trustee's Data Protection Officer. In order to protect your privacy, you may be asked to provide suitable proof of identification before the Trustee can process your request.

Making contact
Zurich Ireland Master Trustee Designated Activity Company's Data Protection Officer is contactable by phone, email, or post via:

- Customer Services on 01 799 2711
- dataprotectionofficer@zurich.ie
- Data Protection Officer, Zurich Ireland Master Trustee Designated Activity Company (ZIMT), Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin.

Please note that this Notice is not a stand-alone document and should be reviewed in conjunction with our Privacy Statement which is available at www.zurich.ie/privacy-statement.

Zurich Life Assurance plc
Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, 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 2025 and may change in the future.

Intended for distribution within the Republic of Ireland.

GR: 9437 Print Ref: ZL PP 6430 0625

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