

# Personal Pension

## Signature Free regular and single premium

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. Before the application is submitted to Zurich Life, you will be asked to confirm that you have answered all questions honestly and with reasonable care. You will also be required to digitally sign the Consumer Declarations including: (i) the Policy Declaration, (ii) the Data Protection Notice, (iii) the Marketing Preferences, and (iv) the Consumer Disclosure.

### 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](mailto:customerservices@zurich.com), or by writing to Customer Services, Zurich Life Assurance plc, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin.

### Plan Details

First Name

Surname

Date of Birth

Retirement Age

Policy start date

**Start Date:** Please note if single premium only, the commencement date will be the latter of the date of receipt of funds or valid fund choice received.

### Contribution Details

#### Regular Premium

€

Payment Frequency

Half Yearly

Quarterly

Monthly

Annual

Method of payment

Direct Debit

Bank Draft

Cheque

Electronic Fund Transfer

Indexation required

No

Yes

#### Single Contribution

€

#### Transfer(s) from other life office(s)

€

Total

€

Single Contribution Method of payment

Bank Draft

Cheque

Electronic Fund Transfer

### Office Use Only

RS Code / Structure

## 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 this policy is a replacement of a Zurich Life policy, please specify the policy number(s):

## Your Investment Options

Please select either **Option 1** OR **Option 2**

### Option 1 Personalised GuidePath

The Personalised GuidePath investment strategy automatically moves your pension money through a series of investment funds tailored to your risk appetite as you go through your working life. As you near retirement, your pension money is gradually switched into funds appropriate for your retirement plan. You can personalise the growth stage, retirement planning stage or strategy end date of your Personalised GuidePath at any time using the secure web portal at [zurich.ie](http://zurich.ie). (Please note that your selection below will not impact the settings on any of your existing policies).

I wish to select the Personalised GuidePath Investment Strategy

<b>Growth Stage</b>	Your Personalised GuidePath defaults to the <b>medium risk/return</b> growth stage. If, instead, you wish to <b>choose an alternative, please specify here:</b> <b>High      Medium      Low</b>
<b>Retirement Planning Stage</b>	Your Personalised GuidePath defaults to target tax free cash (25%) and Annuity (75%) at the end of your retirement planning stage. If, instead, you wish to <b>choose an alternative, please specify here:</b> <b>Tax-Free Cash</b> <input type="text"/> % <b>Annuity</b> <input type="text"/> % <b>ARF</b> <input type="text"/> % (must total 100%)
<b>Strategy End Age</b>	Your Personalised GuidePath strategy end age defaults to your normal retirement age. If, instead, you wish to <b>choose an alternative age, please specify here:</b>

OR

### Option 2 Choose your own funds

If you wish to make a selection below, please DO NOT complete the Personalised GuidePath option above. 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	Single Contribution
Prisma <b>2</b>	<input type="text"/> %	<input type="text"/> %
Prisma <b>3</b>	<input type="text"/> %	<input type="text"/> %
Prisma <b>4</b>	<input type="text"/> %	<input type="text"/> %
Prisma <b>5</b>	<input type="text"/> %	<input type="text"/> %
Prisma <b>Max</b>	<input type="text"/> %	<input type="text"/> %

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

<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<input type="text"/>	<input type="text"/> %	<input type="text"/> %
<b>Total</b>	<b>100%</b>	<b>100%</b>

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.

#### Note

It is important that you clearly write the full fund name when making a selection to avoid any delay in processing your application.

#### Note

An occupation is pensionable if in connection therewith you are a member of a "sponsored superannuation scheme", which is any scheme or arrangement from which you expect to receive a retirement benefit, whether in lump sum or pension form, that will not have been wholly provided out of your own resources.

## Personal Pension Eligibility

- |  |     |    |
|--|-----|----|
| 1. Are you engaged on your own account or as a partner personally acting in some trade, profession or occupation?              | Yes | No |
| 2. Are you an employed person (or the holder of an office or employment) with one or more of your occupations non-pensionable? | Yes | No |

### Personal Details

Mr	Mrs	Ms	Forename				
Surname							
Marital Status	Married/Civil Partner	Single	Separated	Widow(er)	Divorced/Former Civil Partner		
Date of Birth				Gender	M	F	
Country of Residence							
Eircode							
Residential Address							
If the above address is not a residential address please indicate the address type				PO Box	Care of	Standard	
Nationality							
Occupation							
Total earnings				Please indicate the total earnings (e.g. gross salary plus overtime) that you derive from the occupation shown above).			

**Note:**  
Please see below for definitions of these terms.

### Politically Exposed Person (PEP) or Relative or Close Associate (RCA) of a PEP

Are you (or have you been within the last 12 months), a PEP or a RCA of a PEP? Yes No

#### Who is a Politically Exposed Person (PEP)?

A 'Politically Exposed Person' means an individual who is, or has at any time in the preceding 12 months been, entrusted with a prominent public function, (but not including any middle ranking or more junior official) and performs one of the following roles:

- a head of state, head of government, government minister or deputy or assistant government minister.
- a member of a parliament or a similar legislative body.
- a member of the governing body of a political party.
- a member of a supreme court, constitutional court or other high level judicial body whose decisions, other than in exceptional circumstances, are not subject to further appeal.
- a member of a court of auditors or of the board of a central bank.
- an ambassador, chargé d'affairs or high-ranking officer in the armed forces.
- a director, deputy director or member of the board of, or person performing the equivalent function in relation to, an international organisation.
- a member of the administrative, management or supervisory body of a state-owned enterprise.

#### Who is a Relative of a PEP?

- any spouse of the politically exposed person.
- any person who is considered to be equivalent to a spouse of the politically exposed person under the national or other law of the place where the person or politically exposed person resides.
- any child of the politically exposed person.
- any spouse of a child of the politically exposed person.
- any person considered to be equivalent to a spouse of a child of the politically exposed person under the national or other law of the place where the person or child resides.
- any parent of the politically exposed person.
- any other family member of the politically exposed person who is of a prescribed class set out by the Department of Finance.

#### Who is a Close Associate of a PEP?

- any individual who has joint beneficial ownership of a legal entity or legal arrangement, or any other close business relations, with the politically exposed person.
- any individual who has sole beneficial ownership of a legal entity or legal arrangement set up for the actual benefit of the politically exposed Person.

### Contact Details

Mobile Contact Number	Email address & Mobile contact number are compulsory as they will be used for the online approval process.
Email Address	

### 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

### Transfer payment details (only applicable where a transfer is coming from other life office(s)).

Life insurance company Policy number

Email address of contact within transferring Life Insurance Company

Is this transfer the subject of a Pension Adjustment Order (PAO)? Yes No

If yes please supply a copy of the PAO to Zurich Life.

#### 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.

### Premium payment details

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)

#### Please complete if third party payor is a person

First Name  Surname

Gender M F

Country of Residence

Residential Address

Nationality  Type of address PO Box Care of Standard

Relationship to policy owner

#### Please complete if third party payor is a company

Company Name

Address

Country of Incorporation

Relationship to policy owner

### Regular Premium payment details

Direct Debit collection date 1st 7th 15th

Account Holder Name

IBAN

### 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](http://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 August 2023 and may change in the future.

Intended for distribution within the Republic of Ireland.

GR: 8044 Print Ref: ZL LP 7075 0823

