

## PRSA and PRSA AVC

### Signature Free regular and single premium

**The only PRSA applications that must be submitted offline are Salary Deducted/Employer Contribution Single Premium PRSAs (without a regular premium attaching) or where the employer does not remit contributions by Direct Debit. In these instances please refer to our offline application form.**

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 Contract Declaration, (ii) the Data Protection Notice, (iii) the Marketing Preferences, and (iv) the Customer 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

Standard PRSA	Advice PRSA	Is this a PRSA AVC?	No	Yes
Is this a salary deducted or employer paid contribution?*		No	Yes	
If this policy includes a single premium, does this single payment represent a transfer from another pension arrangement?		No	Yes	
If yes, what type of pension arrangement is the transfer payment coming from?				
PRSA	Defined Benefit	Defined Contribution	Defined Contribution AVC	
Pension Arrangement outside Ireland		Personal Pension	PRSA AVC	

First Name      Surname

Date of Birth      Retirement Age

Policy  
Start Date\*\*

#### Note:

\*An application is deemed to be salary deducted/ employer contribution if all contributions either employee or employer are remitted from an employer's bank account. The contract start date will be the 1st of the month following the month of the first payroll deduction. If deductions/ contributions have occurred prior to start date, please contact [prsasupportteam@zurich.com](mailto:prsasupportteam@zurich.com) to arrange the payment of a single contribution.

Please note if this proposal is in respect of a new entrant to an existing scheme, the PRSA support team will need to review the commission options chosen.

\*\*For salary deducted cases, please note a policy start date assumes a prior month deduction from salary and/or contribution from employer through payroll. Example: A policy start date of 1st of November is in respect of October payroll

### Contribution Details

#### Regular Contribution

€

Payment Frequency	Annual	Half Yearly	Quarterly	Monthly
Method of payment	Direct Debit	Bank Draft	Cheque	Electronic Fund Transfer
Indexation required	No	Yes		

#### Once off contribution

€

Method of payment	Bank Draft	Cheque	Electronic Fund Transfer
Once off contribution basis	Personally paid contribution	Transfer(s) from other life office(s)	
	Employer paid/Salary deducted		

**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.

### 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

If you choose the Default Investment Strategy below then this investment strategy will apply to both single and regular contributions.

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

### Option 1 Default Investment Strategy

If you select the Default Investment Strategy, please **DO NOT** complete the Fund Choice section below.

Which Default Investment Strategy do you wish to follow?

Default Investment Strategy (Annuity)

OR

Default Investment Strategy (Approved Retirement Fund [ARF])

OR

### Option 2 Fund Choice

If you wish to make a selection below, please **DO NOT** complete the Default Investment Strategy section above. You may choose to invest in a maximum of 10 funds.

Fund Name	Regular Contribution	Single Contribution
Prisma Low	%	%
Prisma 2	%	%
Prisma 3	%	%
Prisma 4	%	%
Prisma 5	%	%
Prisma Max	%	%
Cash	%	%
Active Asset Allocation	%	%
Cautiously Managed	%	%
Balanced	%	%
Performance	%	%
Dynamic	%	%
Long Bond	%	%
Dividend Growth	%	%
Active Fixed Income	%	%
Eurozone Equity	%	%
International Equity	%	%
5 ★ 5 Global	%	%
5 ★ 5 Europe	%	%
5 ★ 5 Americas	%	%
5 ★ 5 Asia Pacific	%	%
Asia Pacific Equity	%	%
Medium Duration Corporate Bond	%	%
Short Duration Corporate Bond	%	%
Top Tech 100	%	%
Global Short-term Investment Grade Fixed Income (Dimensional)	%	%
Euro Inflation Linked Int Duration Fixed Income (Dimensional)	%	%
World Equity (Dimensional)	%	%
Global Short Fixed Income (Dimensional)	%	%
World Allocation 20/80 (Dimensional)	%	%
World Allocation 40/60 (Dimensional)	%	%
World Allocation 60/40 (Dimensional)	%	%
World Allocation 80/20 (Dimensional)	%	%
Global Value (Dimensional)	%	%
Global Core Equity Lower Carbon ESG Screened (Dimensional)	%	%
Global Small Companies (Dimensional)	%	%
Gold	%	%
Indexed Emerging Markets Equity (Blackrock)	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>

Available on Advice policies only

**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 for further information.

**Advice PRSA Declaration (ONLY APPLICABLE FOR ADVICE PRSA POLICIES)**

An Advice PRSA rather than a Standard PRSA has been chosen because of one of the following:

Investment choice requested not available under Standard

The client requires ongoing advice and monitoring                      Charges are more appropriate

Other

**Personal Details**

Mr              Mrs              Ms              Mx              First Name

Surname

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

Date of Birth

Date of Birth Evidence

Birth Cert              Passport              Drivers License              Other

DOB Source of Evidence Number

Gender              Male              Female

PPS Number

Source of PPS Number

P60              Payslip              Tax Cert              Revenue Correspondance              Other

Country of Residency

Eircode

Residential Address

Country of Nationality

Type of Address              PO Box              Care of              Standard address

If the answer above is 'PO Box' or 'Care of', please confirm reason

In between living arrangements              Travelling              Moving country              Other

**Occupation Class** (please tick one)

**A. Employee**

Manager, professional, technical and administrative

Clerical and secretarial

Personal and protective service

Trades, craft and other related

Plant and machine operatives

Sales

Other

Please specify

**OR B. Not Employee**

Agricultural self-employed

Other self-employed

Please specify

**OR C. Not Economically Active/Unemployed**

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'affaires 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

Email address & mobile contact number are compulsory as they will be used for the online approval process.

### 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

**Premium payment details**  
**(ONLY APPLICABLE FOR SINGLE CONTRIBUTION POLICIES PAID BY YOU OR BY A 3RD PARTY)**

**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.

Who is paying the premium?	Personal Payment	3rd Party
If 3rd party, please provide the third party details below		
<b>Third party payor details (If applicable)</b>		
<b>Please complete if third party payor is a person</b>		
First Name	<input type="text"/>	Surname <input type="text"/>
Gender	M    F	Country of Residence <input type="text"/>
Residential Address	<input type="text"/>	
Nationality	<input type="text"/>	Type of address    PO Box    Care of    Standard
Relationship to policy owner	<input type="text"/>	
<b>Please complete if third party payor is a Company</b>		
Company Name	<input type="text"/>	
Country of Residence	<input type="text"/>	
Address	<input type="text"/>	
Country of Incorporation	<input type="text"/>	

**Regular Premium payment details**  
**(ONLY APPLICABLE FOR REGULAR PREMIUM POLICIES)**

Direct Debit collection date	1st	7th	15th
Account Holder Name	<input type="text"/>		
IBAN	<input type="text"/>		

## Employer and Salary Deduction details (ONLY APPLICABLE FOR SALARY DEDUCTED/ EMPLOYER CONTRIBUTION POLICIES)

**Note:**

Please complete in BLOCK CAPITALS.

Company Name	
Country of Incorporation	
Country of Residence	
<b>If Country of Residence is outside of Ireland, please confirm the following:</b>	
Is the employee paid in euro in Ireland?	Yes No
Is the employee taxed via PAYE Schedule E?	Yes No
Is the bank account from which payments will be deducted held in euro?	Yes No
Is the bank account from which payments will be deducted SEPA reachable?	Yes No
Can the bank account from which payments will be deducted facilitate direct debit deductions?	Yes No
Eircode	
Business Address	
Contact Name	
Office Number	
Mobile Number	
Email Address	
<b>Person Authorised to Sign on Behalf of the Employer</b>	
<b>Note: Please insert details of the person who is authorised to sign on behalf of the employer. This should be a company director or someone that has been authorised by a resolution of the company to act on its behalf.</b>	
Authorised Signatory First Name	
Authorised Signatory Surname	
Mobile Number	
Email Address	
<small>Email address &amp; mobile contact number are compulsory as they will be used for the online approval process.</small>	
<b>Regular PRSA Contribution (per salary payment frequency above)</b>	
% of salary	
Your regular contribution	€ OR %
Your employer's regular contribution	€ OR %
<b>Total</b>	€ OR %
<b>Once-off PRSA Contribution</b>	
Your once-off contribution	€
Your employer's once-off contribution	€
<b>Total</b>	€

## Transfer payment details

(ONLY APPLICABLE WHERE POLICY IS EXPECTING A TRANSFER PAYMENT).

Life insurance company

Policy number

**If the transfer is from a Defined-Benefit or Defined-Contribution scheme, please confirm the following:**

Has the scheme been wound up?      Yes      No

Please note that if the scheme has been wound up, this confirmation needs to come from the trustees of the scheme either in the form of a letter to Zurich or the Revenue confirming the scheme has wound up.

If the scheme has not been wound up, please let us know the following:

Has the client left that employment?      Yes      No

Is the transfer value less than €10,000?      Yes      No

Is the transfer value in respect of Additional Voluntary Contributions?      Yes      No

Does the payment represent a transfer of non-preserved benefits?      Yes      No

Email address of the 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

## AVC details (ONLY APPLICABLE FOR PRSA AVC POLICIES)

### AVC Scheme Details

Are you a 20% director  Yes  No

Date of joining employer

Total Earnings

Gross Salary

Current Value of AVCs

Please confirm if your current arrangement is  Defined Benefit  Defined Contribution

Defined Benefit

### Contribution Details (Only complete if you have selected Defined Benefit above)

Scheme Name

Name of Trustee or Administrator

Trustee Address

Which of the following best describes your current pension arrangement?

Public Sector Scheme  N60th  N80th

Defined Contribution

### Contribution Details (Only complete if you have selected Defined Contribution above)

Scheme Name

Name of Trustee or Administrator

Trustee Address

Current value of Main Pension Arrangement

Contribution Basis

Amount  Percentage of Salary

Employee  €/%  Monthly  Annually

Employer  €/%  Monthly  Annually

As AVCs  €/%  Monthly  Annually

### Details of Previous Pension Benefits - Retained Benefits

Do you have pension entitlements from any source other than your main occupational pension?  Yes  No

Normal Retirement Age  Current transfer value €

Are contributions still being made under the above Scheme/Policy(ies)?  Yes  No

Deferred Retirement Benefits





**Zurich Life Assurance plc**

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

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