

Appointment of a Trusted Contact Person

This application should be used to add a nominated Trusted Contact Person to your policy.

A

What is a Trusted Contact Person?

Under the Consumer Protection Code 2025, a Trusted Contact Person(s) is an individual (aged 18 or older) identified by you, whom Zurich Life may contact in the following circumstances:

- Zurich Life needs to confirm the specifics of –
 - i. your current contact information,
 - ii. your health status, or
 - iii. the identity of any appointed legal guardian, executor or trustee, or
- Zurich Life experiences difficulties in communicating with you.
- Zurich Life has a concern about possible financial abuse affecting you.

Where Zurich Life decides to contact the nominated Trusted Contact Person, Zurich Life may disclose confidential information about you to the Trusted Contact Person for the purposes of discussing the relevant matter only in the circumstances referred to above.

For the avoidance of doubt, a Trusted Contact Person has no authority to deal with the affairs of a personal consumer in respect of a regulated entity, and is not a legal representative, solely on account of having been recorded or contacted by Zurich Life as a Trusted Contact Person.

It is important to note that the terms of any Power of Attorney under the Power of Attorney Act 1996 or an Assisted Decision-Making Agreement under the Assisted Decision Making (Capacity) Act 2015 will take precedence over an appointed Trusted Contact Person.

B

Policy Number(s)

Zurich Life Policy Number

Please note that, if you only provide one policy number, this form will still apply to all your policies. In the event that you would like to change your Trusted Contact Person on your policy, you may do so by providing Zurich Life with a newly signed Trusted Contact Person Form and ticking the below box to indicate that the new form supersedes previous Trusted Contact Person Form(s).

Tick here if this Trusted Contact Person Form supersedes previous Trusted Contact Person Form(s)

Continued overleaf

C

Policy Holder – Personal Details

Mr Mrs Ms Mx

Forename

Surname

Address

Date of Birth

Contact Number

Email Address

D

Trusted Contact Person – Personal Details

Mr Mrs Ms Mx

Forename

Surname

Address

Date of Birth

Contact Number

Email Address

Continued overleaf

Declarations

Part A - Policy Holder

i. 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 of your personal data under data protection legislation. Our Data Protection Notice ('Notice') 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.

ii. Policy Holder Declaration

I consent that Zurich Life may contact the nominated Trusted Contact Person and may disclose confidential information about me for the purpose of discussing the relevant circumstances referred to in section (A) above, including information about my health status.

I understand that that any Power of Attorney under the Power of Attorney Act 1996 or an Assisted Decision-Making Agreement under the Assisted Decision Making (Capacity) Act 2015 will take precedence over an appointed Trusted Contact Person.

I acknowledge that, where the circumstances listed above materialise, the personal details of the appointed Trusted Contact Person may be shared with my Financial Advisor where appropriate.

I understand that the optional appointment of a Trusted Contact person will apply for an unlimited time, and I may withdraw it at any time by notifying Zurich Life. Once your complete written instruction is received, we will remove the data of the nominated person as a Trusted Contact Person from your policy without notifying them.

I confirm that I have read and fully understand all parts of the above declaration (E), (Part A, (i), (ii)) and I authorise Zurich Life to contact the nominated Trusted Contact Person in all the specific circumstances referred to in section (A) above.


Policy Owner:
Please sign and
date.

Policy Holder Printed Name

Signature

X

Date

Part B - Trusted Contact Person

i. 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 of your personal data under data protection legislation. Our Data Protection Notice ('Notice') 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.

ii. Trusted Contact Person Declaration

I understand that, under the Consumer Protection Code 2025, Zurich Life may contact me in relation to the policy holder's policy but only in the specific circumstances noted above and that any Power of Attorney under the Power of Attorney Act 1996 or an Assisted Decision-Making Agreement under the Assisted Decision Making (Capacity) Act 2015 will take precedence over an appointed Trusted Contact Person.

I consent to Zurich Life contacting me and I understand that Zurich Life may disclose confidential information about the policy holder for the purpose of discussing the relevant circumstances referred to in section (A) above, including information about their health status.

I acknowledge that, where the circumstances listed above materialise, my personal details may be shared with the policy holder's Financial Advisor where appropriate.

I understand that the optional appointment of a Trusted Contact Person will apply for an unlimited time, and I may be withdrawing at any time by notifying Zurich Life in writing. Once your complete instruction is received, we will remove you as a Trusted Contact Person linked to the policyholder referenced above.

I acknowledge that, in the event that I am an existing policy holder of a policy with Zurich Life, the data I have provided on this form will also be updated accordingly on my existing Zurich Life policy, except for my email address and phone number which must be updated by logging into the Client Centre on Zurich Life's website at www.zurich.ie

I confirm that I have read and fully understand all parts of the above declaration (E), (Part B, (i), (ii)) and I authorise Zurich Life to contact me in all the specific circumstances referred to in section (A) above in relation to the policyholder's policy.


**Trusted Contact
Person:**
Please sign and
date.

Trusted Contact Person Printed Name

Signature

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, policy 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.

Data Protection Notice (continued)

- 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.

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 Statement 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 Life Assurance plc

Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, Ireland.

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

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