

Items to be returned with this form

The items listed below must be returned in order for us to process your application.

Please tick enclosures:

- 1. Your original birth certificate or passport/driving licence, or a copy of either your birth certificate or passport/ driving licence certified by your Financial Advisor.
- 2. If you are a married/widowed female, your original marriage certificate or a certified copy of your marriage certificate, or an original or certified copy of your passport.
- 3. If you are providing for an annuity to be made payable to your spouse following your death, we require your spouse's original birth and marriage certificates, or copies of same certified by your Financial Advisor, or an original or certified copy of your spouse's passport.
- 4. Your PPS Number. (Ensure you provide your PPS Number in Section B below.)
- 5. Your P45 (without your P45 Zurich Life will deduct tax from the annuity at an emergency rate until a Tax Credit Certificate is received).

IMPORTANT NOTE: Please submit your illustrative annuity quote (which is valid for a limited time period) with this application form.

A Intermediary Details

Note:
Please complete in
BLOCK CAPITALS.

Plan Type (as per the illustration)	R	Intermediary Number	
Intermediary Name			
Financial Advisor Name			

B Personal Details

Note:
Under the Criminal
Justice (Money
Laundering and Terrorist
Financing) Acts 2010
and 2013, Zurich Life
is required to obtain
certain documentation
and information
about the Life Insured/
Beneficial Owner. Further
information may
subsequently be
requested.

Life Insured	
<input type="radio"/> Mr <input type="radio"/> Mrs <input type="radio"/> Ms	Forename
Surname	
Date of Birth	Sex <input type="radio"/> M <input type="radio"/> F
PPS Number	
Civil Status	<input type="radio"/> Married <input type="radio"/> Single <input type="radio"/> Widow(er) <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Civil Partner <input type="radio"/> Former Civil Partner
Address	
Telephone Number (home)	
(mobile)	
Email Address	
Country of Residence	
Nationality	
Pre-retirement Occupation	

Continued overleaf

F Declarations (continued)

Part B - This part should be completed by your Financial Advisor.

I hereby declare that in accordance with Regulation 6(1) of the Life Assurance (Provision of Information) Regulations, 2001, the applicant has been provided with the information specified in Schedule 1 to those Regulations (the relevant Zurich Life Customer Guide) and that I have advised the client as to the financial consequences of replacing an existing policy with this policy by cancellation or reduction, and of possible financial loss as a result of such replacement.



Financial Advisor:
Please sign and date.

Signature of Financial Advisor

X

Date

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Part C - This part should only be completed for transfers from company-paid pension arrangements.

I understand that the above payment represents the full and final discharge of all claims and liabilities in respect of the scheme member. I consent to Zurich Life Assurance plc seeking information and benefit details from the administrator or trustees or any other relevant insurance company of any scheme, arrangement or contract of the Employer, and I authorise the giving of such information and details.



Trustee/Employer:
Please sign and date.

Signature of Trustee/Employer

X

Date

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G Application Checklist

Please ensure that the following details have been completed on the application form.

Please tick

- Any questions which are amended have been initialled.
- All personal details are fully complete.
- Intermediary name, Financial Advisor name and Intermediary number are complete.
- The Declaration has been signed and dated by the Life Insured.
- The single premium has been clearly stated.
- The information submitted with this application is consistent with any previously submitted online application.

Zurich Life Assurance plc

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

Telephone: 01 283 1301 Fax: 01 283 1578 Website: www.zurichlife.ie

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

Intended for distribution within the Republic of Ireland. The information contained herein is based on Zurich Life's understanding of current Revenue practice as at June 2017 and may change in the future.

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