



Company Pensions from Zurich

DC/AVC Plan

Advisor use only

Regular

Once-off

Special instructions

Note: Please complete all sections in BLOCK CAPITALS.

This application is to be used for employee members of Group Pension and/or Group AVC Schemes.

Scheme Details

Scheme Number

Scheme Name

A Your Personal Details

Mr Mrs Ms Forename

Surname (The 'Employee')

Home Address

Date of Birth Sex M F

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

Contact Number

Email Address

Country of Residence

Nationality

B 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.

C Contribution Details

Amount of Gross Regular Contribution		% of Salary		Amount of Once-off Contribution [†]	
Employer	€ <input type="text"/>	OR	<input type="text"/> %	Employer	€ <input type="text"/>
Employee	€ <input type="text"/>	OR	<input type="text"/> %	Employee	€ <input type="text"/>
AVC	€ <input type="text"/>	OR	<input type="text"/> %	AVC	€ <input type="text"/>
Total	€ <input type="text"/>	OR	<input type="text"/> %	Total	€ <input type="text"/>

[†] 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.

D Your Investment Options

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

If you do not select either option your contributions will be invested as per Option 1 - Default Investment Option. **The Trustees of the Pension Scheme have selected the default investment option for the scheme and they will be able to inform you which fund or investment strategy applies.** Please see the fund section on zurichlife.ie for more information on our range of funds and investment strategies.

Option 1 Default Investment Option

I wish to choose the Default Investment Option

Option 2 Choose your own funds

You can choose to invest in a mix of individual funds (up to a maximum of 10). If you wish to invest in a fund(s) that is not listed below, please use the 'Other Funds' box to detail your choice. For full details on our funds, please see the 'Fund Guide' on zurichlife.ie.

Note:

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. For regular contributions, units are bought at the ruling price on the date each contribution is due. If any contribution is not received in full on the date due, Zurich Life may buy units on the day that you pay that full contribution.

Fund Name	Regular Contribution		Once-off Contribution	
	Employer/ Employee	AVC	Employer/ Employee	AVC
Prisma 2	%	%	%	%
Prisma 3	%	%	%	%
Prisma 4	%	%	%	%
Prisma 5	%	%	%	%
Prisma 6	%	%	%	%
SuperCAPP	%	%	%	%
Cautiously Managed	%	%	%	%
Cash	%	%	%	%
Active Fixed Income	%	%	%	%
International Equity	%	%	%	%
Other Funds - please see the 'Fund Guide' on zurichlife.ie for a full list of available funds.				
	%	%	%	%
	%	%	%	%
Total	100%	100%	100%	100%

E Other Pension Policies - details are required as part of the Revenue Commissioners approval process.

1. Other pension policies relating to your current employment

Do you have any other pension entitlements relating to your current employment? Yes No

If yes, please provide details below:

Name of scheme	<input type="text"/>		
Life Assurance Company	<input type="text"/>		
Policy number	<input type="text"/>		
NRA (Normal Retirement Age)	<input type="text"/>	Current total monthly employer and employee contribution	<input type="text"/>
Current fund value	€ <input type="text"/>		€ <input type="text"/>

2. Other pension policies relating to previous employment

Do you have pension entitlements from a previous employment or under any Personal Pension or PRSA? Yes No

If yes, then further information may be required if an employee is near the maximum allowable contribution for this employment and retirement benefits are being calculated using the uplifted scale.

Note:
All policies in respect of the same employment should have the same NRA.

Zurich Life Assurance plc

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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 January 2017 and may change in the future.

Intended for distribution within the Republic of Ireland.

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