



Trustee Investment Plan Application Form



Intermediary Number

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Plan Type
(As per the illustration)

R									
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Note:
Please complete in
BLOCK CAPITALS.

A General Information

Scheme Name

Trustee(s) Name

Country of
Establishment

Revenue Approval
Number

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Revenue Approval
Letter Attached

Yes No

Pensions Board
Approval Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Registered
Administrator

Consultant's Name

Consultant's
Email Address

Consultant's
Telephone Number (work)

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(mobile)

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B Reporting Details

Scheme Renewal
Date

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Reporting Frequency

Quarterly Yearly

Reporting Preference

Email **AND/OR** Hard Copy

Email*

* Note: If you would like us to email investment reports, please supply email address.

AND/OR

Reporting
Address

Number of Copies

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Note:
These details apply only
to Trustee Investment
Plans excluding Small Self
Administered Pensions,
Approved Retirement
Funds or Buy-out Bonds.

Note:

You can choose a maximum of up to 10 funds for your investment.

Note:

*These funds are managed by Threadneedle Investments and are subject to an additional charge of 0.5% per annum.

Note:

† These funds are managed by BlackRock Investments.

C Investment Allocation

Please indicate below the allocation of the contribution between available funds.

Units are bought at the ruling price on a date not later than three working days following receipt of the single premium and the completed application form.

Sector	Pension Fund	% of Contribution
ACTIVE MANAGEMENT		
Equity Concentrated Funds	5 ★ 5 Global	<input type="text"/> %
	5 ★ 5 Europe	<input type="text"/> %
	5 ★ 5 Asia Pacific	<input type="text"/> %
	5 ★ 5 Americas	<input type="text"/> %
Geographic Funds	Irish Equity	<input type="text"/> %
	Eurozone Equity	<input type="text"/> %
	Asia Pacific Equity	<input type="text"/> %
	American Select*	<input type="text"/> %
	European Select*	<input type="text"/> %
Global Equity Funds	International Equity	<input type="text"/> %
	Dividend Growth	<input type="text"/> %
	Global Select*	<input type="text"/> %
Managed Funds	Dynamic	<input type="text"/> %
	Performance	<input type="text"/> %
	Balanced	<input type="text"/> %
	Cautiously Managed	<input type="text"/> %
	Secure	<input type="text"/> %
Active Diversified Funds	Active Asset Allocation	<input type="text"/> %
	Dynamic Diversified Growth†	<input type="text"/> %
Fixed Interest/ Bond Funds	Long Bond	<input type="text"/> %
	Active Fixed Income	<input type="text"/> %
	Ultra Long Bond	<input type="text"/> %
	Core Eurozone Bond	<input type="text"/> %
INDEX TRACKER / EXCHANGE TRADED FUNDS		
Geographic Funds	India Equity	<input type="text"/> %
	Europe ex-UK Index†	<input type="text"/> %
	Japan Index†	<input type="text"/> %
	UK Index†	<input type="text"/> %
	Indexed Eurozone Equity†	<input type="text"/> %
	Indexed Global Equity†	<input type="text"/> %
Sector Fund	TopTech 100	<input type="text"/> %
Commodity Funds	Global Commodities	<input type="text"/> %
	Gold	<input type="text"/> %
Property Equity Funds	European (Ex-UK) Property	<input type="text"/> %
	Australasia Property	<input type="text"/> %
Fixed Interest/Bond Funds	Inflation-linked Bond	<input type="text"/> %
	Indexed Eurozone Government Bond†	<input type="text"/> %
STRATEGY FUNDS		
Strategy Funds	Green Resources	<input type="text"/> %
	Earth Resources	<input type="text"/> %
	Diversified Assets	<input type="text"/> %
OTHER FUNDS		
	<input type="text"/>	<input type="text"/> %
	<input type="text"/>	<input type="text"/> %
TOTAL		100%

E Declaration (continued)

Note:
If the Trustee is an individual - Full Name.
If the Trustee is a corporation - Corporate Name.

Full Name / Corporate Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>
Full Name / Corporate Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>
Full Name / Corporate Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>
Full Name / Corporate Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>
Full Name / Corporate Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>

F Notes

Please note:

1. This application will not be effective until received by Zurich Life Assurance plc, Zurich House, Frascati Road, Blackrock, Co. Dublin.
2. Details of the investment terms and conditions are set out in the policy.
3. A Unit Allocation Statement will be issued showing the number of units allocated to each fund.
4. Unless advised to the contrary, we will deem all instructions in respect of the payment of additional contributions and fund allocations made by the Consultants, named in Section A, to be instructions from the Trustees.

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.

