

Who this form is for

Please give this certificate to your current provider to be completed, signed and sent back to us*. Only on receipt of this certificate, correctly completed application, cheque and other relevant information will your money be invested.

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* Alternatively, ask them to send us the cheque accompanied by a letter giving these details.

Your details and source of funds

Your name

Your address

Date of birth (DD/MM/YYYY) Personal Public Service number N N N N N N N L (L)

Where are your pension fund assets, which are to be invested in a Standard Life ARF and/or AMRF, currently held?

- PRSA
 Personal pension (RAC)
 Buy out bond (personal retirement bond)
 Occupational pension scheme
 Small self-administered pension scheme
 ARF**
 AMRF**
 Vested PRSA**

** If the assets are from an ARF, AMRF or Vested PRSA, give the total distribution (before tax) made in this tax year. If nil, insert €0.

Vested PRSA is a PRSA where you have taken a cash lump sum and/or income.

Are the pension fund assets being moved subject to, or as a result of family law proceedings? (for example, Pension or Property Adjustment Order). If Yes, you should enclose a copy of the Notice or Order. We'll then let you know what further information we'll need. Yes No

Amount of pension fund assets being moved to a Standard Life **ARF** and/or Amount of pension fund assets being moved to a Standard Life **AMRF**

Policy number of pension fund assets
 Provider name

We confirm the details quoted above are correct and certify that the proposed investment is derived from assets to which this client is beneficially entitled, and those assets are derived from an approved source within the meaning of Section 784B or 784D of the Taxes Consolidation Act 1997, as amended.

Provider signature

Date (DD/MM/YYYY)

Position
 For and on behalf of

The insurance company, Trustees, PRSA provider or Qualifying Fund Manager must sign here.



Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.