

**SQVPRSA V02
1013**

Important

This information is required:

1. To satisfy the deemed distribution obligations on your Vested PRSA, we need to establish the correct amount on which the withdrawal should be based.
2. We need to know where to lodge your withdrawals.

Your details

| | |
|-----------------------|---------|
| Title | Surname |
| First names (in full) | |
| Policy numbers | |

Please provide your bank details below. Your withdrawals will be lodged to this bank account*.

| | |
|--------------------------------------|---------------------|
| Branch sort code | Bank account number |
| 9 - - | |
| Bank account name | |
| Name and address of your bank branch | |
| | |

* Please allow 5 business days for the payment to reach your account. Payments must be lodged to your own or your jointly owned Irish personal bank account. Enclose a recent bank statement to confirm this (it can also be used as proof of your address). Payments cannot be made by cheque.

Questions

1. Do you have an Approved Retirement Fund? Yes No
2. Do you have a guaranteed pension for life income of €12,700 per annum? Yes No
If **yes**, please give us evidence** (Revenue require us to hold it on file).
For example, a copy of payment slip, P60 or letter from annuity provider.
3. Do you have an Approved Minimum Retirement Fund? Yes No

If you have answered **yes** to Question 1, 2 or 3 please provide the following details

| Annuity Provider/ Qualifying Fund | Policy type Annuity/ AMRF/ARF | Amount Invested | Start Date (DD/MM/YYYY) | Policy Number |
|--------------------------------------|-------------------------------------|-----------------|----------------------------|---------------|
| | | € | | |
| | | € | | |
| | | € | | |

** The Revenue accepts your State pension and pension annuities as guaranteed income for life. Income in respect of your spouse/civil partner or dependent is not taken into account. Neither is your salary, State assistance, allowances or benefits, rental income, or maintenance order payments.

Contact the Revenue

All withdrawals are subject to tax under the PAYE system, so you need to contact the Revenue.

To ensure the correct taxes are deducted from your payments, the Revenue require us to have an up to date Certificate of Tax Credits. Contact the Revenue on (01) 702 3011 or their PAYE helpline, based on where you live (Standard Life's 'employer' number for vested PRSAs is 9578247P).

- Dublin region: 1890 333 425
- South West region: 1890 222 425
- Border Midlands West region: 1890 777 425
- East and South East region: 1890 444 425

Your declaration

The information given is true and complete.

Your signature

Date
(DD/MM/YYYY)

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
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|--|--|--|--|--|--|--|--|--|--|

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