

# Bulk Personal Retirement Bond (PRB)

## Trustee Declaration

Please complete every item on this form in BLOCK CAPITALS. If any item is blank or illegible, we will not be able to process this application form.

Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at <http://www.irishlifeemployersolutions.ie> or you can ask us for a copy. Advise all potential PRB holders whose data you are providing us of the availability of our Irish Life Data Privacy Notice.



### Financial Advisors

Financial Advisor Name

### Section 1: Scheme Details

Name of Purchasing Pension Scheme

Revenue Reference Number

Pensions Authority Reference Number

Scheme Normal Retirement Age

Trustees

Is the pension scheme winding up?	Yes	No	Date of wind up		
Transferring from:	Defined Benefit	Defined Contribution	Other		
Do the rules of the scheme allow members to avail of the Approved Retirement Fund (ARF) option?	Yes	No			
Are there other pension arrangements associated with the employment?	Yes	No			
Details					

### Section 2: Investment Choice

We have considered the investment options available and chosen the option below to be the default investment choice for members.

1. Irish Life EMPOWER Personal Lifestyle Strategy (EMPOWER PLS)
2. Other Fund/Strategy

Only if scheme is already with Irish Life

3. Maintain existing fund choices

The Trustees ('We') declare that the information is correct and request that a Personal Retirement Bond be issued in the name of each member in accordance with the details provided. We confirm that:

- i. the Purchasing Scheme is (or is intended to be) exempt approved for the purposes of The Taxes Consolidation Act, 1997 as amended.
- ii. the Scheme documentation empowers the Trustees to purchase the Personal Retirement Bond for the members in lieu of the benefits for or in respect of the members under the Scheme.

We consent to such future endorsements that may be required to enable a switch between any versions under the Policy even though such switches may not now be possible under the current terms of the policy. We acknowledge that Irish Life Assurance plc will provide only the benefits purchased under these bonds and will accept no further responsibility in relation to the member and his/her dependants.

We declare that the member shall be entitled to request a transfer payment in accordance with the terms of the Personal Retirement Bond (PRB) to another approved occupational pension scheme or alternative PRB in lieu of the provision of benefits under the Personal Retirement Bond.

#### Duly Authorised to sign for and on behalf of the Trustees

Please sign  
and date  
Name in  
Capital letters

Signature

Date

Name

### Section 3: Politically Exposed Person (PEP) or Relative or Close Associate (RCA) of a PEP

We are obliged under Anti-Money Laundering legislation to identify PEPs or RCAs. A 'politically exposed person' means any individual, who currently is, or has at any time in the past 12 months, been entrusted with a prominent public function.

Are you aware whether any of the potential PRB holders are a PEP or RCA?

Yes

No

### Section 4: Data Privacy Notice and SFDR disclosures

#### Data Privacy Notice

We confirm we have been informed about the Irish Life Data Privacy Notice and where to find it.

We will advise all potential PRB holders whose data we are providing to you of the availability of the Irish Life Data Privacy Notice.

#### Sustainable Finance Disclosure Regulation

We confirm that we have received the relevant Sustainability Related Disclosures.

#### Duly Authorised to sign for and on behalf of the Trustees

Please sign  
and date  
Name in  
Capital letters

Signature

Date

Name

### Section 5: Notes