

CHECKLIST

PLEASE USE THIS CHECKLIST TO GATHER ALL THE DOCUMENTS WE NEED TO PAY YOUR BENEFITS

Please refer to 'Items we require to pay the benefit' in your options letter.



FOR ALL BENEFIT CLAIMS

- A fully completed Option Selection Form, signed by you and the Trustees if applicable.
- Completed 'Other Pension Benefits Form'.
- A copy of your passport or driving licence.
- If the payment is being made to your personal bank account, a copy of the top of a bank statement showing your address, the IBAN and BIC.

Depending on the option(s) you have chosen, please send us all the relevant documents listed below:

Annuity (pension) option

- If you chose a Dependant (Spouse's/Civil Partner) pension, send us a copy of photo ID for your Dependant (Spouse/Civil Partner).
- If you chose a Spouse's/Civil Partner pension, send us a a copy of your marriage certificate.

Transferring to Approved Retirement Fund (ARF) or Approved Minimum Retirement Fund (AMRF)

- Send us a Willing and Able letter or email from the financial company you are taking your ARF/AMRF with, confirming they can accept the transfer from Irish Life.
- Bank account details for the new ARF/AMRF financial company - the IBAN and BIC.



TRANSFERRING TO ANOTHER PENSION ARRANGEMENT

Transfers within Ireland

- A Willing & Able letter/email from the new financial company who is administering your pension plan confirming they can accept our transfer.
- Bank account details for the financial company - the IBAN and BIC.

Overseas transfers

- Please contact us directly for additional information if you wish to transfer to your overseas arrangement.

We will pay your benefit claim once we have received all of the documents.

Irish Life Assurance plc is regulated by the Central Bank of Ireland.
In the interest of customer service we may record and monitor calls. Irish Life Assurance plc. Registered in Ireland number 152576, Vat number 9F55923G.

Irish Life Corporate Business, Lower Abbey Street, Dublin 1, Ireland. T: 01 704 2000 • F: 01 704 1905 • E: code@irishlife.ie • W: www.irishlifecorporatebusiness.ie