

Group PRSA and Executive Pension Top-Up Form

– Regular and Single Contribution

Plan Type:

Group PRSA ☐

Executive Pension ☐

(Please tick only **ONE** box)

1. Client Details

Policy/Member Number:

Policyholder/Member Name:

Policyholder/Member Date of Birth:

D	D	M	M	Y	Y	Y	Y

2. Regular Contribution Increase (if applicable)

New regular Contribution:

Employer:

 €

Employee:

 €

AVC Contribution:

 €

Date increase to take effect from:

D	D	M	M	Y	Y	Y	Y

(No need to be completed if the increase is to take effect from the next possible date)

Please note that the following will apply unless otherwise specified:

- Existing contribution frequency will remain the same
- Regular contributions will automatically be invested in your current fund choice
- If indexation has been selected on a policy, the new contribution will continue to index from the next policy anniversary.

3. Single Contribution Top-Up (if applicable)

Employer Single Contribution:

 €

Employee Single Contribution:

 €

AVC Contribution:

 €

Payment Method:

☐ Cheque ☐ EFT

3. Single Contribution Top-Up (if applicable)(continued)

Fund Choice:

1) Please invest my top-up in my current investment fund choice ☐

Or

2) Please invest my top-up in the following funds:

Fund Name	Percentage
1	%
2	%
3	%
4	%
5	%
6	%
7	%
8	%
9	%
10	%

The top-up will be applied on the next day that unit prices are calculated after receipt of all requirements.

4. Overfunding Check

Regular contribution increases and single contribution top-ups may require a maximum funding check. Please give details of the following:

Current salary:



€

Current fund value of all pension policies:

€

5. Declaration

I / We declare that all of the information provided on this form is true and complete.

	Policyholder/Member:	<input type="text"/>	Date	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	D	D	M	M	Y	Y	Y	Y	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
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	Signature of Employer/ Trustee: where applicable	<input type="text"/>	Date	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	D	D	M	M	Y	Y	Y	Y	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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6. To be completed by the insurance intermediary (if applicable)

- PRSAs - any increases will generate commission based on how the policy was set up.
- Executive pension regular contribution increases - commission payable on the increase will depend on the term to retirement.
- Executive pension single contribution increases - please indicate the following:

Commission requested %

Further information

Brokers

Executive pensions: details on allocation rates and commission are available from our Pensions Existing Business Team, please call (01) 5119200 or email pension@newireland.ie for further details.

PRSAs: details on allocation rates and commission that apply are available from our Group PRSA servicing team, please call (01) 6172000 or email info@newireland.ie for further details.

Policyholders

Details on allocation rates and further information about your policy are available from our Customer Service Team, please call 1890 882852 or email info@newireland.ie for further details.

If making payment by EFT, please include the policy number in the transaction reference field.

For a Contribution restart, we also require a completed direct debit mandate. This form is available from the Popular Customer Forms section of our website.

New Ireland Assurance Company plc.,

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