

# Individual/AVC PRSA and Personal Pension Top-Up Form – Regular and Single Contributions

**Plan Type:**

Individual/AVC PRSA ☐

Personal Pension ☐

(Please tick only **ONE** box)

## 1. Client Details

Policy Number:

Policyholder Name:

Policyholder Date of Birth:

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|   |   |   |   |   |   |   |   |

## 2. Regular contribution Increase (if applicable)

New regular contribution:

Please note that the following will apply unless otherwise specified:

- Existing contribution frequency will remain the same
- Increases will be effective from the next contribution due date
- Regular contributions will automatically be invested in your current fund choice

## 3. Single contribution Top-Up (if applicable)

Single Contribution:

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

Payment Method:

☐ Cheque ☐ EFT

**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        | %          |

#### 4. Overfunding Check (Please complete if AVC PRSA only)

##### 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 pensions:

#### 5. Declaration

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



Signature of Policyholder:

Date

| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|
|   |   |   |   |   |   |   |   |

#### 6. To be completed by the insurance intermediary (Please complete for SPs into Personal Pensions only)

Commission requested

%

#### Further information

##### Brokers

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

PRSAs: details on allocation rates and commission that apply are available from our Individual PRSA team, please call (01) 6172223 or email [individualPRSA@newireland.ie](mailto:individualPRSA@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](mailto: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.



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