

GUIDE TO FURTHER REQUIREMENTS FOR CORPORATE POLICIES

In order to process your request for any of the transactions listed below we require the following documentation:

Personal Pension Plan / Self Employed Deferred Annuity Transfer/ Maturity

- Letter of Request signed by Policyholder (for Transfer)
- Retirement Request Form signed by Policyholder (for Maturity)
- Original Policy Document/ Lost Policy Declaration (available on our website www.phoenixireland.ie)
- Letter of Acceptance from the receiving Life Company
- Age Admittance (for Maturity)

Scheme Pension Transfers

- Completed Withdrawal Form with Trustee authorisation
- Letter of Acceptance from the receiving Life Company of the scheme
- New Schemes Revenue Reference Number
- Original Policy Document / Lost Policy Declaration (available on our website www.phoenixireland.ie)
- Details of who the proceeds are to be paid to

Scheme Pension Maturity

- Completed Retirement Advice Form with Trustee authorisation
- Original Policy Document/Lost Policy Declaration (available on our website www.phoenixireland.ie)
- Age Evidence e.g. certified copy of Passport or Driving License
- Salary Information - If more than a 20% director we need P60's for 3 consecutive year's salary. If ordinary employee then final salary e.g. P60 or P45 will suffice.
- Letter from accountant if no other salary evidence is available. (If you don't have an accountant you will need to contact your local revenue office)
- If choosing the ARF/AMRF options then completed transfer forms are required along with letters of acceptance from the receiving Life companies and the account details to which the funds are to be paid

In some cases additional information may be required and you will be notified as soon as possible