

EXECUTIVE PENSION - REQUEST TO TRANSFER TO AN APPROVED MINIMUM RETIREMENT FUND (AMRF) OR APPROVED RETIREMENT FUND (ARF)

COMPLETE ALL DETAILS

Member's Name:

Scheme Number(s)

Please make the cheque payable to:
(Name of Qualifying Fund Manager)

We wish to transfer the fund or part of the fund accrued under the above Scheme or Scheme(s) in respect of the above Member's retirement benefits to an Approved Minimum Retirement Fund and/or Approved Retirement Fund with a Qualifying Fund Manager in accordance with the provisions of the 1999 Finance Act. We confirm the Scheme Rules provide for this transfer.

We understand that payment by Harcourt Life to the Qualifying Fund Manager named above will be an absolute discharge for all liability in respect of the proportion of the fund to be transferred, including but not limited to, any guaranteed benefits accumulated under it to the date of the transfer and/or due under it at retirement.

Signature for and on behalf of the trustee(s) or administrator of the Scheme:	<input type="text" value="X"/>	Date	<input type="text"/>
Print Name	<input type="text" value="X"/>	Date	<input type="text"/>
Signature of the member:	<input type="text" value="X"/>	Date	<input type="text"/>
Print Name	<input type="text" value="X"/>	Date	<input type="text"/>

Please take special care to satisfy yourself that the investment meets your needs. In particular please make sure that you are clear as to the financial consequences of effecting an AMRF/ARF, including the effect of removing any guarantees attaching to your current entitlements. If you are in doubt about this, please contact your insurance intermediary or Harcourt Life.

PRIVACY STATEMENT

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy on our website www.harcourtlife.ie or you can request a copy from our Customer Service Team.