

BENEFIT CRYSTALLISATION EVENTS DECLARATION REQUIRED by SECTION 787R(4), TCA,1997

Please complete this form using **BLOCK CAPITALS**

Policy Name:
 (Print Name)

Policy Number

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This Declaration should be completed and given to the Administrator of your pension arrangement prior to the payment of any benefits from that arrangement.

If you have a Personal Fund Threshold Certificate, issued by Revenue, please enclose a copy with your completed Declaration. Where your PFT includes a defined benefit arrangement, please state the valuation factor used.

Information in relation to payment of the State pension from the Department of Social & Family Affairs is not required.

This Declaration should be completed in respect of benefits arising on or after 7 December 2005, but not including benefits of this claim.

(tick one box)

1. Did you become entitled, on or after 7 December 2005, to any pension, lump sum or any other pension related benefit?

Yes No

2. Prior to, or on, the date of receiving benefits from this pension arrangement, do you expect to become entitled to any pension, lump sum or any other pension related benefit from another pension arrangement?

Yes No

3. Have you directed, on or after **7 December 2005**, or do you intend to direct prior to the date of receiving benefits from this pension arrangement, that a payment or transfer be made to an overseas pension arrangement?

Yes No

4. If you have answered **YES** to any of the above questions, please provide the following details to the Administrator of your pension arrangement

(i) Name of the scheme or arrangement

(ii) Contact details for the Administrator

(iii) Policy or reference number

(iv)	Type of pension arrangement	
(v)	Date of entitlement to benefits	
(vi)	Benefits provided or Value if benefits are still to be taken	
(vii)	Amount of any transfer or payment to an overseas arrangement and contact details for the receiving pension arrangement	€
(viii)	Total amount of any tax free cash already taken	€
(ix)	If a defined contribution arrangement, the value of the fund on the date of benefit entitlement	€
(x)	If a defined benefit arrangement the amount of annual pension, the amount of any lump sum and the factor used for calculating the capital value of the pension	€
(xi)	The amount or market value of any assets transferred by exercise of an "ARF option".	

I declare that to the best of my knowledge and belief, the information in this Declaration is correct

Name
(Print Name)

PPS Number

Signature Date

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.