

## 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.harcourtlife.ie](http://www.harcourtlife.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.harcourtlife.ie](http://www.harcourtlife.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.harcourtlife.ie](http://www.harcourtlife.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**