

Overseas Transfer Declaration

1. Details of Individual requesting transfer:

Name:

Address:

PPS No:

Contact Phone Number:

Occupation:

2. Details of Irish Pension Arrangement from which transfer is to be made:

Type of Arrangement:
(ie DC/DB Occupational
Pension scheme/PRSA)

Name or Title of Arrangement:

3. Details of Irish Pension Arrangement Administrator

Name: *Harcourt Life*

Address: *16 Joyce Way
Parkwest Business Park
Dublin 12*

Contact Phone Number: *01 6399859*

4. Details of Overseas Receiving Arrangement:

Location:

Type of Arrangement:
(ie DC/DB Occupational
Pension scheme/PRSA)

Name or Title of Arrangement:

5. Details of Administrator of Overseas Receiving Arrangement:

Name:

Address:

Contact Phone Number:

6. State the reason for the Transfer:

Declaration

I declare that the transfer request I am making conforms to the requirements of the Occupational Pension Schemes and Personal Retirement Savings Accounts (Overseas Transfer Payments) Regulations 2003 (SI No 716 of 2003) and to Revenue transfer rules, is for bona fide purpose of circumventing Irish pension tax rules and Revenue pension rules and conditions.

For transfer to non-EU countries only – I declare that I am currently employed in the country where the Receiving Scheme is established.

Signed:

Date:

Witness (administrator of Irish arrangement)

To be returned with 7 days to:

Revenue Commissioners
Large Cases Division
Financial Services Pensions
Ballaugh House
75-93 Mount Street
Dublin 2

Declaration by Overseas Receiving Arrangement Administrators

1. Details of the Receiving Arrangement

Name of receiving scheme:

Country of establishment:

Approved by relevant authority:

Title of approving authority:

Scheme registration number or reference:

Transfer payment to be made out to:

2. Confirmations needed for a transfer to proceed:

a) The Individual is a member of the Receiving Scheme:

b) The transfer payment will be used solely to provide benefits for the Individual on retirement not earlier than age 50, other than in the case of ill health early retirement, or for his/her dependants in case of the Individual's death.

c) The amount of the transfer value that can be taken in lump sum form will be limited to the amount that the individual would otherwise be entitled to (see below), and we will pass on this restriction with any subsequent transfer of the Individual's benefits.

*Maximum Tax Free Lump Sum from transferring arrangement: €
To be dynamised by Consumer Price Index rates from (date of leaving service) to
Retirement Date.*

Declaration signed on behalf of the receiving arrangement:

Signature

Print Name

Title

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.