

Reason for Considering Transfer

- 1. Investment Performance
- 2. The cost of the policy is more than I wish to pay
- 3. I received a better offer from a different financial institution
- 4. I am dissatisfied with the customer service provided to me.

Section 1 - Member and employment details

Plan number

Member name

Employer name

Date of withdrawal from scheme

Withdrawal due to Scheme wind up Member leaving service Change of provider

If member left service please confirm date

Please confirm below where member is withdrawing from the scheme due to wind up or leaving service.

Date of joining service

Current salary (for employees) €

Or

If 20% director, last 3 years salaries

€ <input type="text"/>	Year <input type="text"/>
€ <input type="text"/>	Year <input type="text"/>
€ <input type="text"/>	Year <input type="text"/>

Section 2 - Transfer options

Please tick one option below.

- (A) Transfer to an occupational pension scheme
Please give the name of the employment the receiving scheme is in respect of
What is the Revenue Approval Reference of the receiving scheme?
Is the receiving scheme a small self-administered scheme? Yes No
If you answer Yes to the above question we need a copy of the Revenue approval letter in order to proceed.
Or
- (B) Transfer to a buy out bond/personal retirement bond
Or
- (C) Transfer to a PRSA
Or
- (D) Refund of the value of member contributions
Not allowed if:
 - The member is a 20% director.
 - The member has completed more than 2 years in the pension scheme or is entitled to a statutory preserved benefit under the Pensions Act 1990.
 - If there has been no member contributions made to the scheme.Or
- (E) Transfer to an Overseas Pension Scheme
Country where new scheme is contracted
Are you currently employed in that country? Yes No

Note: Transfers to a PRSA will only be allowed where the member has been in the pension scheme for 15 years or less, the scheme is winding up or the member is changing employment. These restrictions do not apply to the transfer of AVCs. Further restrictions may apply.

Note: If the member chooses a refund of the value of their own contributions, standard rate tax must be deducted under Case IV of Schedule D from the refund. The value of employer contributions paid on the member's behalf will be refunded to the employer who should treat it as a trading receipt in the year of payment.

Note: The overseas transfer form must be completed by the member and receiving scheme in addition to this form.

Section 3 - Payment details

The cheque will be drawn in the name of the insurance company/trustee/PRSA provider to which the transfer is being made.

Name of insurance company	<input type="text"/>
Cheque payee	<input type="text"/>
Address to which cheque will be sent	<input type="text"/>
Receiving arrangement policy reference	<input type="text"/>
Contact name	<input type="text"/>

Section 4 - Pension Adjustment Order

Has a notice to Trustees been received in connection with a judicial separation or divorce of this member? Yes No

Has a Pension Adjustment Order been issued or is in the process of being issued in respect of pension benefits held on behalf of the above member? Yes No

If this section is not completed, we will assume that a Notice to Trustees or a Pension Adjustment Order has not been issued on the pension plan.

Section 5 - Trustee declaration (Must be the trustee of the plan number being claimed)

I hereby declare that, I, being Trustee of the scheme, am legally entitled to claim the amount payable as indicated, cancelling all risk benefits from the date of withdrawal, where applicable. I confirm that the information provided above is correct and that where applicable the receiving scheme has been approved by the Revenue Commissioners/the receiving PRSA plan has been approved by the Revenue Commissioners and The Pensions Authority.

I confirm that where the scheme does not already contain the appropriate rule, the scheme rules are hereby endorsed to allow the member to opt for the ARF/AMRF option in accordance with Section 772 of the Taxes Consolidation Act 1997, as amended.

Signature of trustees	<input type="text"/>
Name in block capitals	<input type="text"/>
Position in company	<input type="text"/>
Date	<input type="text"/>

If you have appointed an independent company to act as trustee then they must give their agreement before we can pay a transfer. Ark Life will arrange this by contacting the trustee on your behalf to let them know of your request.

Section 6 - Member declaration (to be completed in all cases)

I hereby instruct the Trustees that, on cessation of my membership of the above numbered pension scheme (previous scheme) as noted on this form, the benefits I would be entitled to thereunder will be transferred to the selected scheme/ PRSA. I understand that no pension and/or life assurance benefits will be provided for me under the previous scheme with effect from the date of the transfer/refund. In consideration of the payment of an appropriate transfer to the selected scheme, PRB, or PRSA, I hereby release both the Trustees of the above named scheme and Ark Life Assurance Company dac for all liability of benefits thereunder with effect from the date of such transfer. I understand that payment of cash under Option D above means the forfeiture of all other retained benefits under the scheme.

Signature of member	<input type="text"/>
Name (CAPITAL LETTERS)	<input type="text"/>
Date	<input type="text"/>

Ark Life
Assurance Company dac

If yes, please provide a copy of the Pension Adjustment Order.

Complete in all cases, unless you have appointed an independent company to act as trustee.