

**Who this form is for**

Please give this certificate to your current provider to be completed, signed and sent back to us\*. Only on receipt of this certificate, correctly completed application, payment\*\* and other relevant information will your money be invested.

COS30 V14 1025

\* Alternatively, ask them to send us a letter giving these details.

\*\* Make your electronic fund transfer to Standard Life International dac, IBAN: IE81 HSBC 990231 37001649, and quote reference: member surname, first name, and date of birth (dd/mm/yyyy).

**Your details and source of funds**

Your name

Your address

Eircode

Date of birth (DD/MM/YYYY)

Personal Public Service number

**Where are your pension fund assets, which are to be invested in a Standard Life ARF or Synergy Vested PRSA, currently held?**

☐ PRSA ☐ Personal pension (RAC) ☐ Buy out bond (personal retirement bond) ☐ Occupational pension scheme

☐ Small self-administered pension scheme ☐ ARF^ ☐ Vested PRSA^

^ If the assets are from an ARF or Vested PRSA, give the total distribution (before tax) made in this tax year. If nil, insert €0.

Are the pension fund assets being moved subject to, or as a result of family law proceedings? (for example, Pension or Property Adjustment Order).

☐ Yes ☐ No

Amount of pension fund assets being moved to a Standard Life ARF or Synergy Vested PRSA

Policy number of pension fund assets

Provider name

Vested PRSA is a PRSA where you have taken a cash lump sum and/or income. Only a Vested PRSA can move to a Vested PRSA.

If Yes, you should enclose a copy of the Notice or Order. We'll then let you know what further information we'll need.

**We confirm the details quoted above are correct and certify that the proposed investment is derived from assets to which this client is beneficially entitled, and those assets are derived from an approved source within the meaning of Section 784B of the Taxes Consolidation Act 1997, as amended.**

**Provider signature**

**Date** (DD/MM/YYYY)

Position

For and on behalf of

The insurance company, Trustees, PRSA provider or Qualifying Fund Manager must sign here.

  
Signature