



Approved Retirement Fund (ARF)  
Approved Minimum Retirement Fund (AMRF)  
**Application Form**

**A Personal Details**

Name in Full (Mr/Mrs/Ms/Other)

Contact Address

Contact Telephone Number

Date of Birth  Marital Status  PPS Number

**B Investment Details**

Product Name	Amount to Invest
<input type="text"/>	€ <input type="text"/>
<input type="text"/>	€ <input type="text"/>
<input type="text"/>	€ <input type="text"/>

Please make cheques payable to **"BCP Asset Management Limited"**

**C Investment Information**

*Only complete the following section if you are applying for an ARF; if you are applying for an AMRF, please move directly to the Declaration in Section D overleaf.*

Do you have an Approved Minimum Retirement Fund investment with BCP Asset Management Ltd or another Qualifying Fund Manager? Yes  No

If yes, please provide the following details:

Qualifying Fund Manager  Reference No.

Amount of Original Investment €

If you do not have an Approved Minimum Retirement Fund, you must be able to answer yes to at least one of the following three questions:

1. Are you aged over 75? (if yes, please provide proof of age) Yes  No

2. Are you receiving pensions (including Social Welfare) of at least €18,000 per annum? (If yes, please attach copies of payment slips) Yes  No

3. Have you paid at least €119,800 from a retirement fund to buy a pension annuity? If yes, please provide the following details:

Insurance Company

Reference No.  Amount of Premium €

Date of Investment

## D Declaration

I hereby declare that to the best of my knowledge I am eligible to invest in an Approved Retirement Fund/Approved Minimum Retirement Fund under the Taxes Consolidation Act, 1997 (as amended).

I have read through the replies to all the questions in this application form and declare that to the best of my knowledge and belief all information and statements given whether in my handwriting or otherwise are accurate and complete. I understand that failure to give true and complete answers to all questions may be grounds for rejecting a claim.

I have not withheld or suppressed any material information and where in doubt about whether certain material facts are relevant I have disclosed them. I declare that I will inform BCP Asset Management Ltd of any change to any material fact occurring before acceptance of this application and understand that failure to do so may result in the proposed contract becoming void.

I hereby apply to invest in an (please tick as applicable):

Approved Retirement Fund  Approved Minimum Retirement Fund

and agree that this Application shall form the basis of the contract between BCP Asset Management Ltd and myself and shall be subject to the normal investment conditions of BCP Asset Management Ltd.

Where I have applied to invest in an Approved Minimum Retirement Fund I understand that the Approved Minimum Retirement Fund in which I am about to invest cannot be capable of being surrendered, assigned, commuted except as provided for by the Taxes Consolidation Act, 1997 (as amended).

**I authorise, where relevant, each of my previous qualifying fund managers to disclose to BCP Asset Management Ltd such particulars as may be requested.**

**I authorise, where relevant, any insurance provider or pension scheme trustees to provide BCP Asset Management Ltd with details of any pension annuity being paid to me.**

### Material Facts:

A material fact is one that will influence whether and upon what terms BCP Asset Management Ltd accepts this Application. Failure to give complete and true answers and disclose all material facts could result in the Application becoming void. If there is any doubt whether a certain fact is material it should be disclosed.

### Data Protection:

BCP Asset Management Ltd will treat all information given to it as confidential and will not disclose such information except as permitted by you or as required by law. The information provided will only be used in compliance with the Data Protection Acts 1988 and 2003. (As amended or replaced from time to time and any regulations made under those acts).

The information may be used to send you details about investment products and other services available from BCP Asset Management Ltd that might interest you.

If you do not wish to receive such information please tick this box:

BCP will lodge your investment in the Relevant Bond to a clearing account at the bank. The funds will then be swept to a client asset account with the bank in the name of BCP. You will receive a confirmation from the bank of your investment in the Bond. The client asset accounts will contain funds which are pooled with other clients funds. A pooled client account is a client bank account in which the funds of more than one client are held. You do not have a claim against a specific sum in a specific account. Your claim is against the client assets pool in general.

## NOTICE: PLEASE READ THE DECLARATION BEFORE SIGNING

Warning: If you propose to take out this investment in complete or partial replacement of an existing investment, please take special care to satisfy yourself that this investment meets your needs. In particular please make sure that you are aware of the financial consequences of replacing your existing investment. If you are in doubt about this please contact your advisor.

### Declaration by Client:

I confirm that I have read and understand the above Declarations and the Terms and Conditions as set out in the brochures for the product(s) in which I am investing, and agree to be bound by them.

Signature of Client

Date

**WARNING: BCP HIGH YIELD DEPOSIT PLAN; If you invest in this product you will not have access to your money for 5 years.**  
**WARNING: BCP 50/50 SPLIT DEPOSIT BOND; If you invest in this product you will not have access to 50% of your money for 1 year and 50% of your money for 4 years 3 months. Double Growth - The value of your investment may go down as well as up. Quadruple Growth - The value of your investment may go down as well as up. You may get back less than you invest. If you invest in the Quadruple Growth Bond you could lose 10% of the money you invest.**  
**WARNING: BCP ABSOLUTE RETURN BOND; The value of your investment may go down as well as up. If you invest in this product you will not have access to your money for 3 years and/or 5 years and 3 months. If you cash in part of your investment on the early exit date you may lose some or all of this part of the money you invest.**

Please refer to the relevant ARF Brochure and Key Features for full details



BCP Asset Management Limited

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Email: [invest@bcp.ie](mailto:invest@bcp.ie) Web: [www.bcp.ie](http://www.bcp.ie)

BCP Asset Management Limited is regulated by the Central Bank of Ireland.

Agent Stamp

# Approved Retirement Fund (ARF) Approved Minimum Retirement Fund (AMRF) Transfer Certificate

**PLEASE NOTE:**

Before BCP Asset Management Ltd can accept funds into an ARF or an AMRF, we must receive this Certificate fully completed by the existing Qualifying Fund Manager, pension or PRSA provider, appropriately stamped.

## ARF Applicant Details

Name

Address

**TRANSFER AMOUNT**

The amount being transferred is €

A. from an existing ARF

or

B. from a pension fund/retirement annuity contract/PRSA

Existing ARF contract/policy number:

Name of scheme/assurance company or PRSA provider:

Revenue Approval Number/Policy No:

## AMRF Applicant Details

Name

Address

**TRANSFER AMOUNT**

The amount being transferred is €

A. from an existing AMRF

or

B. from a pension fund/retirement annuity contract/PRSA

Existing AMRF contract/policy number:

Name of scheme/assurance company or PRSA provider:

Revenue Approval Number/Policy No:

## ARF Only

If the effective date of the original ARF is **pre 6th April 2000**, please state **in respect of the ARF assets being transferred**:

1. The amount represented by income & capital gains: €

2. The amount represented by the residue balance: €

TOTAL €

## Declaration

**ARF:** The applicant named above is beneficially entitled to the proceeds of this fund which are being transferred to an ARF or have previously been transferred to an ARF in accordance with subsection (2A) of Section 784 of the Taxes Consolidation Act 1997. The assets to be transferred do not form part of an AMRF within the meaning of Section 784C of the Taxes Consolidation Act 1997.

**AMRF:** The applicant named above is beneficially entitled to the proceeds of this fund which are being transferred to an AMRF or have previously been transferred to an AMRF in accordance with subsection (2A) of Section 784 of the Taxes Consolidation Act 1997.

Signed:   
(Authorised Signatory)

Print Name:

On behalf of:

Contact Telephone Number:

Date:

Official Stamp