

# BCP PERSONAL RETIREMENT BOND APPLICATION FORM

Name of Intermediary:

## SECTION I. PERSONAL DETAILS TO BE COMPLETED BY SCHEME MEMBER

Mr./Mrs./Ms. Surname:	<input type="text"/>	PPS No:	<input type="text"/>
First Name(s):	<input type="text"/>	Sex:	<input type="text"/>
Address:	<input type="text"/>	Spouse's Name:	<input type="text"/>
Country of Residence:	<input type="text"/>	Spouse's Date of Birth:	<input type="text"/>
Date of Birth:	<input type="text"/>	Home Tel. No:	<input type="text"/>
Marital Status:	<input type="text"/>	Mobile Number:	<input type="text"/>
		Email Address:	<input type="text"/>

## SECTION 2. TRANSFERRING SCHEME AND TRANSFER VALUE TO BE COMPLETED BY TRUSTEE, EMPLOYER OR SCHEME MEMBER

Name of Employer:	<input type="text"/>	Name of Trustee(s):	<input type="text"/>
Full Name of Scheme:	<input type="text"/>	Basic salary at date of leaving service:	<input type="text"/>
Revenue Reference No:	<input type="text"/>	<b>or</b>	
Date employment commenced:	<input type="text" value="DD / MM / YY"/>	P60 earnings for 3 consecutive years in the last 10 years prior to date of leaving service (Schedule E):	€ <input type="text"/>
Date of leaving service:	<input type="text" value="DD / MM / YY"/>		€ <input type="text"/>
Normal retirement date:	<input type="text" value="DD / MM / YY"/>		€ <input type="text"/>

If the answer of any of the next six questions is 'YES', then please give full details in the box below:

- (i) Was an approved Retirement Annuity effected in respect of a previous non-pensionable employment or while self-employed? Yes:  No:
- (ii) Is the employee and/or his/her dependant(s) entitled to benefits from another Retirement Benefits Scheme? Yes:  No:
- (iii) Has the employee received any benefits, other than a refund of contributions, on leaving any other service? Yes:  No:
- (iv) Does the employee and/or his/her dependant(s) hold more than 5% but less than 20% of the equity and/or the voting control of the company? Yes:  No:
- (v) Does the employee and/or his/her dependant(s) hold more than 20% of the equity and/or the voting control of the company? Yes:  No:
- (vi) Has the employee irrevocably surrendered his/her right to commute annuities under the scheme? Yes:  No:

Transfer value: €	<input type="text"/>	Amount attributable to employee's contributions (if applicable):	€ <input type="text"/>
		Amount attributable to AVC contributions (if applicable):	€ <input type="text"/>

Is the employee splitting his transfer value between two or more Personal Retirement Bonds? Yes:  No:

If transfer value is from a U.K. Scheme, qualified recognised overseas pension scheme status is required. Please contact BCP Asset Management for further details.

Has a Pension Adjustment Order (POA) been granted on any transfer value paid into the scheme. If yes please attach a copy to this form: Yes:  No:

## SECTION 3. BENEFITS TO BE PROVIDED UNDER THE POLICY

1. If a spouse's pension on death after retirement is to be provided, specify the appropriate percentage of the employee's pension before commutation to apply:
2. Rate of increase of spouse's pension(s) during payment applicable under the scheme (% p.a. compound)
3. If the employee has chosen to split his transfer value between two or more policies is this policy to be endorsed to the effect that benefits arising on retirement are wholly non-commutable? Yes:  No:

## SECTION 4. FUND CHOICE

1.  %
2.  %
3.  %
4.  %

## SECTION 5. DECLARATIONS

**DATA PROTECTION: BCP are registered under the Data Protection Acts 1988 and 2003 and your personal data held by BCP will be maintained in accordance with the obligations of the Acts as amended or replaced from time to time and any regulations made under these acts.**

### TRUSTEE'S APPLICATION AND DECLARATION

We the trustees of the scheme request BCP Asset Management Limited ('BCP') to issue the scheme member named overleaf, a contract or contracts in his/her name in accordance with the details set out in this proposal and subject to the conditions prescribed by BCP which are to be set out in the contract or contracts and declare that:

1. the statements made above are to the best of our knowledge and belief true and complete;
2. the purchase price arises from the proceeds of a Retirement Benefits Scheme which is, or is to be, exempt approved under the Taxes Consolidation Act 1997;
3. the scheme makes (or will be amended to make) provision for a member to receive his/her scheme entitlement on leaving or on winding-up by a buy-out policy.

Signature for the trustee(s): *Sign here X*

Date:  /  /

### MEMBER'S DECLARATION Before signing this Declaration please read the note below.

1. I consent to an amount which in the opinion of the trustees of the scheme represents the value on withdrawal from the scheme being bought out under one or more contracts with BCP.
2. In consideration of this contract expressing a contractual obligation to me and being issued in my name, I release the trustees of the scheme from all liability to me for all benefits in respect of me under the scheme.
3. I agree that the information contained in this application and such further information (if any) as I or the trustees of the scheme shall supply to BCP in connection with this application shall be the basis of the contract or contracts.
4. I consent to BCP seeking information and obtaining benefits from the administrator/trustees (and/or relevant insurance company) of any scheme, arrangement or contract of which I am/have been, a member.

*Sign here X*

Date:  /  /

### Note: Cheques are to be made payable to BCP Asset Management Limited

**Note:** It should be borne in mind when considering the financial implications of 'buy-out' that rights under a pension scheme are being given up in exchange for a contract under which a substantial element of the estimated benefits depend on future investment conditions and cannot be guaranteed. BCP provide the benefits purchased under the policy or policies and will accept no further responsibility in relation to the former scheme member.

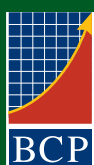
- For investments made into the 50/50 Split Deposit Bond, the Government pension levy for 2012 will be funded by BCP and reclaimed from the maturing 12 month deposit. BCP will also retain a further sum to cover the pensions levy for 2013 and 2014 from the maturing 12 month deposit. Should the levy be extended beyond 2014, BCP will fund the levy for 2015 and deduct this from your full maturity.
- For investments in the High Yield Deposit Plan, the annual pension levy will be deducted from the annual interest income received.
- For investments made into the Absolute Return Bond, 1.80% of your investment amount will be retained to cover the estimated pension levies payable in 2012, 2013 and 2014. Should the levy be extended beyond 2014, BCP will retain a further sum at the early exit date to meet the pension levies payable in 2015 and 2016.
- Levy payments where funded by BCP will be funded at a rate of the prevailing ECB rate + 2.5%.

**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 Investment Brochures and Key Features for full details



### BCP Asset Management Limited

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

Agent Stamp

Advisor's Name