Outgoing Worker Declaration
Member Claim Form

EU (Supplementary Pensions Rights) Regulations 2019

The European Union (Supplementary Pension Rights) Regulations 2019 (S.I. No 447 of 2019) provide additional rights for members of pension plans who are 'Outgoing Workers'. These additional rights include the right to a refund of any employer contributions paid on your behalf on or after 13 September 2019 where you are not entitled to a Preserved Benefit from the plan.

In order for the Trustees of your plan to establish if you are an Outgoing Worker and your eligibility for this benefit, you should complete this form. **Please complete every item on this form in BLOCK CAPITALS.** If any item is blank or illegible, this will cause a delay in processing your claim.

Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at **http://www.irishlifecorporatebusiness.ie** or you can ask us for a copy.

Section 1: Pension Plan Details

Plan Name   Plan Number

Section 2: Member Details

Member Name   Member Number

Section 3: Establishing if you are an Outgoing Worker

An Outgoing Worker is a person who:

A.   Prior to their current employment worked in another EU member state where they were a member of a supplementary pension plan.

B.   Whose next job, after leaving the employment related to their membership of a pension plan, is in another EU member state.

Please tick the appropriate box which reflects your circumstances upon leaving service of your previous employment:

Option 1   **1a.**   If you are an Outgoing Worker as described in (a) above then you will need to provide written evidence from your former employer that you were a member of a supplementary pension plan while working for that employer.

Or

1b.   If you are an Outgoing Worker as described in (b) above then you will need to provide written evidence from your new employer that you have commenced employment with them or are about to do so and the date that your employment begins.

Option 2   I confirm I am not an Outgoing Worker as outlined above.

Section 4: Requirements to pay your benefits

If you are an Outgoing Worker

We can now arrange a refund of the value of the employee and employer contributions received on or after the 13 September 2019 less tax. The current rate of tax on refunds is 20% but may be subject to change in the future. Please sign and return this form along with the following information in order to process your payment:

✓ Completed and signed Options Selection Form.

✓ Evidence that you are an Outgoing Worker in the form of a letter on company headed paper:

   1a. From your previous EU Employer confirming you were a member of their pension scheme or

   1b. From your new EU Employer confirming your commencement date.

✓ Photographic ID in the form of a copy of a passport or driving license (please do not send original documents).

✓ A copy of the top of a bank statement showing your address, IBAN and BIC.

If you are not an Outgoing Worker

We can now arrange a refund to you of the value of the employee contributions you paid less tax. The current rate of tax on refunds is 20% but may be subject to change in the future. Please sign and return this form along with the following information in order to process your payment:

✓ Photographic ID in the form of a copy of a passport or driving license (please do not send original documents).

✓ A copy of the top of a bank statement showing your address, IBAN and BIC.

Section 5: Data Privacy Notice and Employee Declaration

Data Privacy Notice

I confirm I have been informed about the Irish Life Data Privacy Notice and where to find it.

Declaration

I confirm that the details I have provided in Section 3 above about whether or not I am an Outgoing Worker are correct. I have provided the required documentation based on these details.

Please sign and date

Signature   Date

Irish Life