

Supplementary Information Form to be provided to the Irish Revenue Commissioners

Individual Name

PPS Number

1. Tax Residency Confirmation

Are you currently residing in Ireland?

☐

Yes

☐

No

Are you permanently resident outside Ireland?

☐

Yes

☐

No

Do you have any intention of returning to Ireland to live, work or retire?

☐

Yes

☐

No

2. Intended pension benefits from the overseas pension scheme

Name of Receiving Scheme

Please outline in what manner you currently intend taking benefits from the overseas pension scheme

Intended Retirement Age

Intended Percentage Tax Exempt Lump Sum Payment:

%

Remaining Funds will be used to provide:

☐

Annual Drawdown of Pension Income*

☐

Purchase of a Lifetime Pension Annuity*

☐

Flexi-Access Income Drawdown (UK Schemes only).

*Please ensure you tick one of these if transferring to a Malta, IOM or Gibraltar Pension Scheme.

3. Individual Confirmation

I confirm that information outlined above in this form to the best of my knowledge is complete and correct.

Signature

Full Name in Block Capitals

Date