

# EXECUTIVE PENSION - REQUEST TO TRANSFER TO AN APPROVED RETIREMENT FUND (ARF)

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost PanEurope dac.

## IMPORTANT NOTES

### WHAT TO DO WHEN YOU HAVE COMPLETED THIS FORM

Our preference is to receive documentation scanned and emailed. Please return the completed form(s) and supporting suitably certified documentation to [Info@UTMOST.ie](mailto:Info@UTMOST.ie).

If you are unable to send documentation electronically, it can be posted to Utmost PanEurope dac, Bishop's Square, Redmond's Hill, Dublin 2, Ireland.

### HOW WE USE YOUR INFORMATION

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at [www.utmostinternational.com/privacy-statements/](http://www.utmostinternational.com/privacy-statements/) or you can request a copy from our Client Relations Team.


### USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

## A MEMBER DETAILS

The below section must be fully completed.

Title (Mr, Mrs, Miss or Other)	<input type="text"/>
Member's Name	<input type="text"/>
Scheme Number(s)	<input type="text"/>
Bank / Building Society Name	<input type="text"/>
Branch Address	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/> - <input type="text"/>
Account Name	<input type="text"/> <input type="text"/>
Account Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Sort code	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> (must be 6 digits)

This is the bank details of Qualifying Fund Manager. 

UTMOST PANEUROPE DAC

EXECUTIVE PENSION - REQUEST TO TRANSFER TO AN APPROVED  
RETIREMENT FUND (ARF)

Building Society Roll Number/ Reference	<input type="text"/>
SWIFT code	<input type="text"/>
IBAN	<input type="text"/>

**B** DECLARATION

We wish to transfer the fund or part of the fund accrued under the above Scheme or Scheme(s) in respect of the above Member's retirement benefits to an Approved Retirement Fund with a Qualifying Fund Manager in accordance with the provisions of the 1999 Finance Act. We confirm the Scheme Rules provide for this transfer.

We understand that payment by Utmost PanEurope dac to the Qualifying Fund Manager named above will be an absolute discharge for all liability in respect of the proportion of the fund to be transferred, including but not limited to, any guaranteed benefits accumulated under it to the date of the transfer and/or due under it at retirement.

**Signature for and on behalf of the trustee(s) or administrator of the Scheme**

<b>SIGNATURE</b>	<input type="text"/>
Print Name	<input type="text"/>
Date	<input type="text"/>

**Signature of the member**

<b>SIGNATURE</b>	<input type="text"/>
Print Name	<input type="text"/>
Date	<input type="text"/>

**Take special care to satisfy yourself that the investment meets your needs. In particular make sure that you are clear as to the financial consequences of effecting an ARF, including the effect of removing any guarantees attaching to your current entitlements. If you are in doubt about this, contact your insurance intermediary or Utmost PanEurope dac.**

A WEALTH *of* DIFFERENCE