

Top up my PRSA

If you would like to top up your pension with an increased regular contribution or single contribution, simply complete the below and return to:

Customer Services Zurich Life, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin or email a scanned copy of this top up request to customerservice@zurich.ie

A PRSA Contribution Increase Request

Note:

Please complete in
BLOCK CAPITALS.

Client Details

Client Name	<input type="text"/>
Client Number	<input type="text"/>
Policy Number	<input type="text"/>

Please note: If your existing policy does not facilitate the investment of the top up amount, you may be issued with a new policy.

B Top Up Details

I would like to make a lump sum top up of

€

I wish to make my top-up by:

☐ EFT ☐ Cheque/Bank Draft

AND/OR

I would like to increase my regular contributions

€

☐ Monthly ☐ Quarterly ☐ Half Yearly ☐ Yearly

C Fund Selection

☐ I would like the above amount(s) invested as per the current fund selection on my pension policy noted above.

OR

Please invest the above amount(s) as follows:

Fund Name	New Allocation
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
Total	100%

Office use:
LABrokers - Agency 00928 - Client to receive a 100% allocation and an annual management charge of 0.75%.

Making an EFT payment to Zurich Life

Important: In order to make an EFT payment, you will need our **new bank details below**.

Top-ups to an existing Zurich policy

Account Name:	Zurich Life Assurance plc
IBAN:	IE67CITI99005100101206
BIC:	CITIE2XXXX



The two-step rule:

1. Let us know it's you

Always quote the Policy Number or if it's a new plan, quote the Name & Date of Birth of the policy owner in the EFT reference.

If you're making a payment from:	Place your Policy Number/Name and DOB in this field:
Bank of Ireland	"Reference" field
AIB	"Receiver Message" field
Permanent TSB	"Reference" field
Ulster Bank	"Beneficiary" field
KBC	"Reference" field

2. Let us know it's done

So that we can track and allocate the payment, please send the completed top up form above or an email to escashiers@zurich.com, Customer service (customerservices@zurich.com) or your service team telling us:

- A. Exact amount
- B. Policy Number or if it's a new plan, quote the Name & Date of Birth of the policy owner
- C. Supporting instructions (if relevant)



Help us, Help you!

Picture yourself looking through your bank statement trying to decipher different transactions, it can be a time consuming and sometimes frustrating task.

At Zurich we allocate hundreds of payments daily, so if the above information isn't provided it can lead to delays in service.

With your help we can get your policy up and running in no time!



Is there anything else I need to know?

Depending on who you bank with, it can take 3-5 working days for Electronic Transfers to reach us.

With this in mind, please remember that the Investment date is the date we receive funds assuming that we have a valid fund choice. If we don't have a valid fund choice, the effective date will be the date that the fund choice is received.

Zurich Life Assurance plc

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Zurich Life Assurance plc is regulated by the Central Bank of Ireland.

The information contained herein is based on Zurich Life's understanding of current Revenue practice as at September 2022 and may change in the future.

Intended for distribution within the Republic of Ireland.

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