
Transfer in acceptance form

Before providing us with your personal information, it is important that you understand your data protection rights, as well as how and why your personal information is used. This information is detailed in our Data Privacy Notice, which is accessible on our website (https://aonhub.tbs.aon.com/legal/TAIMT_Privacy_Notice_2024.pdf).

Your Details

- a. Name:
- b. Date of Birth (dd/mm/yyyy):
- c. Member Reference No.:
- d. PPSN:

We can only progress your Transfer if you provide us with all the information in this form. Note that the Transferring Scheme may require a separate written confirmation from you of your request to Transfer your benefits.

Source of Transfer

Where is the transfer value coming from?

- A company pension scheme, including Master Trust, AVC scheme or self-administered scheme
- A Personal Retirement Bond (PRB) or Buy Out Bond (BOB)
- A Personal Retirement Savings Account (PRSA)
- A pension arrangement outside the State

If the transfer value is from an overseas pension please contact us for specific requirements. Transfers from the UK or from pension schemes which have UK tax-relieved contributions cannot be accepted as our pension scheme is not registered as QROPS with HM Revenue & Customs

Transferring Office / Scheme Details

- a. Name of transferring Life Office / Trustees:
- b. Transferring plan reference number:
- c. Contact details:

Member Declaration

- I confirm I wish to proceed with the transfer of my benefits held with the Pension Plan named above ("the Transferring Scheme") to the Aon Ireland MasterTrust ('the Receiving Scheme').
- I confirm that I am aware that it is my responsibility to take appropriate financial advice in relation to the suitability or otherwise of this transfer. Neither Aon nor the trustees of The Receiving Scheme are providing this advice.
- I understand the investment date of the transfer in will be based on the date on which Aon receives all necessary requirements.
- I note my transfer in will be invested in line with my current investment strategy for my regular employer contributions.

Signature

Date (dd/mm/yyyy)