Willing & Able

We have created a New Feature giving you the ability to control the willing & able process.

EASIER to USE MY BIZ – Willing & Able Process

What changes have been made?

- The aim of this is to speed up the process and put you in control
- Once you have submitted your ARF, AMRF or PRB application a new tab will appear in the ‘Outstanding Requirements’ section of your MyBiz pipeline
- Complete a simple online form
- An email will automatically generate to the correct address based on the choice of life company which attaches the W&A letter
- A history of requests is also available to allow easy tracking

Features
This feature is available on the following products:

- Personal Pension
- PRB
- ARF
- AMRF

This feature is **not** available on Company Pensions or PRSA’s.

Let’s get started!

This guide will bring you step by step through the willing & able functionality.

**Enter My Biz as normal**
To start the willing and able process select **Proposal Requirements**.

Complete a simple online form by answering:
- Select the transferring plan type from a drop down list
- Choose the relevant life company / provider
- Inputting the transferring policy number

The List of all relevant life companies / providers are shown on the drop down
An email from the Irish Life Pensions Team will automatically generate to the correct mailbox in the chosen life company/provider, attaching the W&A letter and any other relevant documentation needed (eg PAO form).

You can choose to blind copy yourself on the email

You will get clear confirmation the email has been sent

A history of requests is available for you to view to allow easy tracking

Report shows 10 per page as a default - this can be expanded. There can also be more than one page
Sample Documents
Below is a sample of the letter & PAO document that will be attached to the email.

07/06/2018

Irish Life No:
Your Ref No: TEST
Client: Ms

Dear Sir or Madam,

I can confirm that the above Irish Life plan is a Personal Retirement Bond.

This plan is capable of accepting a transfer value from the Company Pension for Ms

Please provide details of the Employer, Employee and AVC split and confirm if a Pensions Adjustment Order has been granted on this plan. Also please advise if the rules of the scheme allow the member to avail of AMRF / ARF options.

Irish Life Requirements - we will require the following attached forms to be completed if a PAO has been granted

- Additional information if PAO form
Or
- Confirmation of details requested within the above forms to be completed and returned to Irish Life

All transfer payments by cheque should be made payable to Irish Life Assurance, with plan number, 11902611, referenced on your attaching correspondence

Alternatively, if you would like to pay the transfer value by EFT all the instructions you will need to make your payment can be found on the Irish Life website. From the Home page just go to the Help Centre and you will find the instructions on “Making a Payment to Irish Life by Electronic Fund Transfer” within the Billing area of the Help Centre. Due to a change in our security and data protection policy we can no longer confirm our EFT details on our willing and able letters.

Please email Pensionsnewbusiness@irishlife.ie to confirm when the payment has been made.

If you have any questions or need further help, please contact the Irish Life Customer Service Team at customerservice@irishlife.ie or on 01 704 1010, lines open Monday to Thursday 8am to 6pm, Friday 10am to 6pm, Saturday 9am to 1pm. In the interest of Customer Service we will record and monitor calls.

Yours sincerely,

Sé Weston
Executive Manager - Customer Service
Sample Additional Information
If pension adjustment order is in place the system will attach the relevant form as per below.

### Additional Information if Pension Adjustment Order Granted

<table>
<thead>
<tr>
<th>Pensions New Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Irish Life Assurance plc.</td>
</tr>
<tr>
<td>Lower Abbey Street</td>
</tr>
<tr>
<td>Dublin 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transferring Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Client Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>□/□/□</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Irish Life Reference Number</th>
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</thead>
<tbody>
<tr>
<td>□□□□□□□□□□□□□□□□□□□□□□□□□□□□□</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Has a Pension Adjustment Order (PAC) granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement, or on any pension arrangement from which the transferring arrangement received a transfer?</th>
<th>Yes [ ] No [ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does this transfer represent a non-member spouse's designated benefit granted under a PAO?</td>
<td>Yes [ ] No [ ]</td>
</tr>
</tbody>
</table>

If yes to either question a court certified copy of the PAO is needed and we require the additional information below.

#### Where transfer contains member’s benefit only

**Non-member spouse’s details**

- Name: ____________________________
- Address: ____________________________
  ____________________________
  ____________________________
- PPSN (If known): ____________________

#### Where member’s benefit is transferring to an occupational pension scheme or buy out bond:

Please confirm that the non-member’s retirement lump sum entitlement (under salary & service route) at date non-member’s designated benefit was transferred out: € ________________

#### Where was non-member spouse’s benefit transferred to?

- Type of arrangement: ____________________________
- Name and address of provider: ____________________________