

Are you resident or ordinarily resident in the Republic of Ireland?

- Yes - If **Yes**, no further documentation is required.
- No - If **No**, and the policy has a commencement date **after 1/1/2001**, we will require a completed Declaration of Residency Outside Ireland form before any payment is made as you may qualify for exit tax exemption. To request a declaration form please contact our Customer Service Team on **1850 200 318**. If no declaration is completed immediately before the withdrawal, then exit tax will be deducted, where applicable, in accordance with your policy conditions.

Is this policy currently assigned (securing a loan)?

- No - The policyholder(s), and any trustee(s) where relevant, should complete this form.
- Yes - This form should be completed, stamped by the assignee (lender) and returned. If a full encashment is required, the deed of assignment and the original policy schedule should also be included.
If this policy has been re-assigned to the policyholder(s), the policyholder(s) should complete and return this form, along with a letter of no further interest from the assignee (lender).

Policyholder declaration (please read the important points to note below)

Other than where the policy is held in trust or assigned, we declare that we are the legal owner(s) of the policy. We direct New Ireland Assurance to pay the withdrawal proceeds to the account details set out. Where the original policy schedule is unavailable/lost, we agree to indemnify and hold harmless New Ireland Assurance from and against all claims, costs, charges and expenses which may occur by reason thereof and I/we will deliver the policy schedule to New Ireland Assurance should it hereafter come into my/our possession.

Signature of first policyholder

D	D	M	M	Y	Y	Y	Y

D	D	M	M	Y	Y	Y	Y

Signature of second policyholder (if applicable)

D	D	M	M	Y	Y	Y	Y

D	D	M	M	Y	Y	Y	Y

Trustee declaration (where policy is held in trust)

We the trustee(s), declare that we are the legal owner(s) of the policy. We direct New Ireland Assurance to pay the withdrawal proceeds to the account details set out. **Note: ID and proof of address are required for the trustee(s) and beneficiaries.**

Signature of first trustee

D	D	M	M	Y	Y	Y	Y

D	D	M	M	Y	Y	Y	Y

Signature of second trustee (if applicable)

D	D	M	M	Y	Y	Y	Y

D	D	M	M	Y	Y	Y	Y

Assignee declaration (where policy is assigned)

We, the assignee(s), declare that we are the legal owner(s) of the policy. We direct New Ireland Assurance to pay the withdrawal proceeds to the account details set out.

Assignee Signature

Assignee staff signatory number (where applicable):

Assignee stamp (required for assigned policies):

Important points to note

- 1) If your address has changed from that previously notified, we will require evidence of your most recent address, or if your surname has changed as a result of marriage, we will require a copy of your marriage certificate.
- 2) If you are paying regular premiums, a policy review will follow each partial withdrawal and changes will be notified to the legal owner/s of the policy. If **€6,500.00** or more is withdrawn since the last policy review, policy benefits may be reduced as set out in the policy conditions. If your policy is a single premium investment, the minimum withdrawal amount is **€1,000.00** and the minimum value required to keep your policy in force is **€3,500.00**.
- 3) A withdrawal on a paid up policy may reduce the policy benefits and remaining term of the policy.
- 4) A charge of **€25.00** currently applies for all partial withdrawals. This charge is subject to change.
- 5) For direct credit transfers outside of the Republic of Ireland, please note that currency and additional bank charges may apply and transmission times may be longer. Transfers to certain countries may also be prohibited.
- 6) For policies with a commencement date on or after **01.01.2001**, additional units will be encashed from your policy to cover life assurance tax (currently 41%). Life assurance tax only applies to any gains made on the policy.
- 7) If a premium due for payment prior to the effective date of the encashment is debited, you may not be entitled to a refund.