

Claim for Migrant Member Relief

PART 1 This part is to be completed by the Migrant Member

Name:

Address:

PPS Number:

I confirm that I am Irish resident with effect from

 / /

Prior to taking up residence in Ireland, I was resident in
(insert relevant country) for a continuous period of not less than 3 years.

I commenced making contributions to the Overseas Pension Plan on

 / /

I confirm that the contributions made by me to the plan before I took up residence in Ireland were eligible for tax relief in (insert relevant country).

I confirm I have irrevocably instructed the Plan Administrator to provide the Irish Revenue Commissioners with any information required in relation to contributions to and benefits from the pension plan.

Signed:

Date:

 / /

PART 2 This part is to be completed by the Plan Administrator

Name of Pension Plan:

Address:

Tax Reference No.:

Member's Policy No.:

Date member joined plan:

 / /

Date contributions commenced:

 / /

Contributions paid by the member in year ended

 31 / 12 /

Contributions paid by the member's employer
in year ended

 31 / 12 /

Currency

Amount

 € / € /

Date benefits first become payable:

 / /

I confirm the plan is established for the sole purpose of providing retirement benefits and that contributions to the plan are eligible for tax relief in (insert relevant country).

Signed:

(Plan Administrator)

Date:

 / /