

Bloxham Approved Minimum Retirement Fund (AMRF) Application Form

Bloxham is a Qualifying Fund Manager, as defined in Section 784A, Taxes Consolidation Act, 1997.

1. Your Personal Account Information

Name _____

Mr Mrs Ms Other _____
(Tick as appropriate)

Address _____

Date of Birth _____ / _____ / _____

PPS No.

Married Single Other _____
(Tick as appropriate)

Ph (Home) _____

Mobile _____

Email _____

(To receive email updates from Bloxham, you must supply your email address)

2. Assets to be transferred to the AMRF

Please tick the relevant box or boxes and fill in the details.

Retirement Annuity or Retirement Annuity Trust Scheme

Value of assets to be transferred € _____

Name of Life office or Trust Scheme _____

Policy number _____

Occupational Pension Scheme

Value of assets to be transferred € _____

Name of Scheme _____

Name of Life office (if applicable) _____

Policy number (if applicable) _____

Revenue Reference number _____

Approved Retirement Fund

Value of assets to be transferred € _____

Name of Qualifying Fund Manager _____

Policy number/Reference number _____

Total Assets € _____

3. Declaration

I declare that:

1. I wish to establish an Approved Minimum Retirement Fund (AMRF), as defined in Section 784A, Taxes Consolidation Act 1997, to be held in my name with Bloxham.
2. **The assets in the AMRF shall consist of one or more of the following:**
 - I. Assets transferred to the fund by virtue of the exercise by me of an option in accordance with Section 772(3A) or Section 784(2A), Taxes Consolidation Act, 1997;
 - II. Assets which were previously held in another AMRF, as defined in Section 784A, Taxes Consolidation Act 1997, held in my name or in that of my deceased spouse; and/or
 - III. Assets derived from the assets referred to in (i) and (ii).
3. I am beneficially entitled to the assets to be transferred to the AMRF.
4. All appropriate declarations and certificates have been supplied.

Client Signature _____ Date _____

For Office Use Only

Approved for set up:

Qtr Reports _____ Mgt Fee _____

Broker/Intermediary _____ Dealer Ref _____

Gross

Retain Always

Nominee

Advisory

Discretionary