

Bloxham Approved Retirement Fund (ARF) Application Form

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

1. Your Personal Account Information

Name	_____	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="checkbox"/>	_____
		(Tick as appropriate)				
Address	_____	Date of Birth	____/____/____			
	_____	PPS No.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	_____	Married <input type="checkbox"/>	Single <input type="checkbox"/>	Other <input type="checkbox"/>	_____	
	_____	(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 ARF

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

<input type="checkbox"/>	Retirement Annuity or Retirement Annuity Trust Scheme	
Value of assets to be transferred		€ _____
Name of Life office or Trust Scheme	_____	
Policy number	_____	
<input type="checkbox"/>	Occupational Pension Scheme	
Value of assets to be transferred		€ _____
Name of Scheme	_____	
Name of Life office (if applicable)	_____	
Policy number	_____	
Revenue Reference number	_____	
<input type="checkbox"/>	Approve Retirement Fund	
Value of assets to be transferred		€ _____
Name of Qualifying Fund Manager	_____	
Policy number/Reference number	_____	
Total Assets		€ _____

3. Investment Instructions

Please indicate how you want your ARF to be invested

Personal Portfolio	€ _____
Other	€ _____

4. Compliance with Section 784C, Taxes Consolidation Act 1997

Please tick the appropriate box and fill in the details.

I confirm that:

The following assets have been transferred to an Approved Minimum Retirement Fund held in my name.

Value of assets to be transferred € _____

Date transferred _____

Name of Qualifying Fund Manager _____

Policy number/Reference number

The following assets have been applied in the purchase of an Annuity payable to me.

Value of assets to be transferred € _____

Date transferred _____

Name of Qualifying Fund Manager _____

Policy number/Reference number

I am entitled to Specified Income as defined in Section 784C, Taxes Consolidation Act 1997, payable for my life of €12,700 p.a. The details are as follows:

Amount of pension/annuity € _____

Payer of pension/annuity _____

Address _____

Policy number/Reference number

5. Declaration

I declare that:

1. I wish to establish an Approved Retirement Fund (ARF), as defined in Section 784A, Taxes Consolidation Act 1997, to be held in my name with Bloxham.
2. **The assets in the ARF 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 ARF, 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 ARF.
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