



# DEFINED CONTRIBUTION PENSIONS

JULY 2015

We work in partnership with our clients to make the administration of our Defined Contribution (DC) and Additional Voluntary Contribution (AVC) pension schemes as simple as possible. Our goal is 'right first time, right every time'. We continuously review and re-evaluate how we do things to provide an outstanding service for all of our pension schemes. We provide the following scheme services to our clients as standard.

## SCHEME AND NEW MEMBER SET UP SERVICES

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- Transfer of records from a previous arrangement.
- Set up new entrants records.
- Issuing of welcome pack and our member-friendly booklet.
- Registration with Pensions Authority as Registered Administrator (where required).
- Request Revenue approval.

## PAYMENT PROCESSING SERVICES

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- Application of payroll software.
- Collection and processing of payments.
- Issue tax certificates (where required).

## INVESTMENT FUND SERVICES

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- Apply up to 6 free switches a year.
- Management of lifestyle strategies.
- Provide monthly investment reports.

## ONLINE SERVICES

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- Provide online access for members, trustees and employers through our award winning Pension Planet Interactive system.
- A comprehensive website containing information about all our tools and products, investment details for all the funds and strategies we offer, pre-retirement planning tools and a download centre. Visit [www.irishlifecorporatebusiness.ie](http://www.irishlifecorporatebusiness.ie).

## MY PENSION APP FOR SMARTPHONES

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- This App is designed for members of DC and AVC pension schemes and gives an overview of pension scheme details on the go. Key features include being able to see the current fund value, interactively estimating the value at retirement, viewing investment literature and much more.

## MEMBER COMMUNICATION SERVICES

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- Carry out work-site member communication sessions.
- Conduct one-to-one sessions with members to ensure full understanding of their pension scheme details and contribution levels.
- Issuing of Statements of Reasonable Projections and Annual Benefit Statements.

## BENEFIT SERVICES

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- Issue options for members who are retiring or leaving.
- Process death and disability claims.

## TRUSTEE SUPPORT SERVICES

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- Supply trustee reports.
- Complete abridged Trustee report.
- Attend and participate in Trustee meetings.
- Provide Trustee training, approximately every 6 weeks.
- Deliver Trustee administration reports.
- Report to clients, Brokers and Trustees on the 21 day rule.

## LEGAL SERVICES

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- Provide regular legislative and regulatory updates.
- Record and liaise with solicitors on Pension Adjustment Orders.

### CONTACT US

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