



**PLATINUM  
PENSIONER TRUSTEES**

# **SELF ADMINISTERED PENSIONS**

**APPLICATION FORM**







## SECTION 4 – INTRODUCER DETAILS

### INTRODUCER

Company .....

Contact Name .....

Address  
.....  
.....  
.....

Work Number

Mobile

Email .....

Fax .....

## SECTION 5 – IMPORTANT NOTES

### Dependants, Vested Rights and Trustees of your SAPS

- Your spouse and children are automatically included as dependants unless special instructions to the contrary are received.
- Full vested rights are provided under the Platinum Self Administered Pension Scheme (SAPS) trust deed and rules. This means that in the event of your leaving the employment of the company within 2 years of joining the scheme the value of all contributions paid in to the scheme by both employer and scheme member will remain in the scheme.
- Two (2) trustees are appointed to your Platinum SAPS – the pensioneer trustee (Platinum Pensioneer Trustees Ltd) and the additional trustee (the SAPS Member).

### Declarations

- I confirm that I have completed this application form to the best of my knowledge, ability, and belief. The information in this application form together with the terms and conditions contained in the Platinum Pensioneer Trustees Ltd Letter of Engagement and Terms of Business form the basis of the contract between Platinum Pensioneer Trustees Ltd and the employer and scheme member regarding the administration of the SAPS.
- I acknowledge that my SAPS set up will commence when Platinum Pensioneer Trustees Ltd has received and accepted a fully completed application form and SAPS set up fee. My SAPS will only be submitted to the Revenue Commissioners for approval only when all documentation, information and fees requested has been provided to Platinum Pensioneer Trustees Ltd.
- I am aware that there is a setup fee payable to Platinum Pensioneer Trustees Ltd in respect of the SAPS set up and submission of my SAPS to the Revenue Commissioners and I agree to this fee being levied to the employer company.
- I am aware that there is a recurring annual fee payable to Platinum Pensioneer Trustees Ltd in respect of the administration of the SAPS and I agree to this fee being levied to the employer company.

### Data Protection Acts

The information that you have provided will be treated as confidential and retained by Platinum Pensioneer Trustees Ltd as required by law. You have a right to request a copy of the information we hold about you (for which we may charge a nominal fee) and have any inaccuracies in your information corrected.

Platinum Pensioneer Trustees Ltd may use the information you have provided for the purposes of providing you with additional information relating to the services of Platinum Pensioneer Trustees Ltd, any of its associated companies and/or third parties.

Platinum Pensioneer Trustees Ltd may share information with its associated and affiliated companies and/or carefully selected third parties, to enable those associated and affiliated companies and/or carefully selected third parties, to contact you directly in relation to the services.

If you do not agree to Platinum Pensioneer Trustees Ltd's use of the information for such purposes, please tick the box provided.

SAPS Scheme Member

Employer Establishing SAPS



**I have read and understand the above**

**SCHEME MEMBER**

**SPONSORING EMPLOYER**

Sign .....

Sign .....

Print Name .....

Print Name .....

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**IMPORTANT CHECKLIST**

Ensure all of the following is provided to enable Platinum Pensioner Trustees Ltd to set up your SAPS

**SAPS SET UP**

Completed SAPS Application Form

Completed SAPS Bank Account Mandate

SAPS Set Up fee

Signed and sealed 'Letter of Engagement'

Most recent P60

**ANTI MONEY LAUNDERING**

2 certified utility bills (no older than 3 months)

**FOR OFFICE USE ONLY:**

A: .....

AM: .....

P: .....

PA: .....

T: .....

TA: .....

SP: .....

**ADDITIONAL INFORMATION:**