

The An Post and An Post Trade Union Group

Additional Voluntary Contribution Retirement Benefit Scheme



	Existing Group Number	6	0	5	0	0	5	6	0		In	Intermediary Number				0	2	4	5	2	
	Intermediary Name	Halligan Insurances																			
	Financial Advisor Name																				
Note: Please complete in	Employee Deta	ails																			
BLOCK CAPITALS.	Mr M	rs		Ms			Fore	name													
	Surname																				
	Address																				
	Date of Birth										Sex		М			F					
	Marital Status	Married/Civil Partner Single Separated									ated	\ \ \	Vidov	v(er)		Divor	ced/Fo	rmer	Civil P	artner	
	PPS Number																				
	Contact Number																				
	Email Address																				
	Nationality																				
	Country of Residence																				
	Occupation																				
	Employee Number																				
	Do you contribute t	to the	o the Main Scheme?																		
	Do you contribute t	to the Spouses's and Children's Scheme? Yes No																			
	Date of joining An Post																				
	Your Normal Retirement Age			Minim	num ag	e 60															
	Annual Basic Salary	€						Total Annual Earnings			€	€					(refer to your last P60)				
	PRSI Class	•	А		D	(cons	ult you	r payslip	if unsi	ure)											

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Date plan membersr	nip is to commence	Щ													
Date contributions a	are to commence														
Regular AVC Amou	nt														
Amount of Weekly Contribution	€			A.P. F Plan		on		R	S	5	1	8	Н	R	Н
Optional Lump Sun	n AVC Amount				,,										
Amount of Once-off Contribution					ensio			R	S	5	6	2	Н	S	D
(Optional)	•			Plan	Type			•				_			
Investment Fun	nd Strategy														
The consultants appo		the Ar	n Post	Trade	Unic	on Gro	oup h	ave r	ecom	meno	ded th	at if v	ou ar	e moi	re tha
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Note:

Please ensure that you sign the appropriate box at the end of Section E.

E Declarations by Employee

(i) Data Protection Notice

Zurich Life Assurance plc ('Zurich Life', 'we', 'our') is a member of Zurich Insurance Group ('the Group'). Zurich Life is the data controller for this contract under data protection legislation. Our Data Protection Notice ('Notice') for this product is detailed at the end of this form. Please read this carefully.

By signing this form I confirm that I have read and understood the Data Protection Notice.

I authorise the Department of Employment Affairs and Social Protection or the Revenue Commissioners to advise Zurich Life of my most recent address on their records at any future time.

(ii) Marketing Preferences

In the future, we may have offers and news that we would like to share with you about our products and services at those of the Group or third parties. Please let us know your marketing preferences below:	nd
1. I do not want to receive information about Zurich Life products and services by:	
Post Email SMS text message	
2. I do want to receive information about Zurich Life products and services by:	
Phone	
3. I do want to receive information about Group or third party products and services by:	
Post Email Phone SMS text message	
customerservices@zurich.com, or by writing to Customer Services, Zurich Life Assurance plc, Zurich House, Frascati R Blackrock, FREEPOST, Co. Dublin. (iii) Policy Declaration I have read the product Information provided in respect of the Plan and I confirm the investment strategy selected. I declare that the statements in this application are true and complete (including any statements written down at my dictation), and I agree that this declaration shall be the basis for the proposed Plan and the policy with Zurich Life. If the policy was sold, signed or completed outside Ireland, insert the name of the country where it was sold, signed or completed.	
I acknowledge that in order to administer the policy, it may be necessary for Zurich Life to seek information and benefit details from the administrator, Trustees or other relevant insurance office of any scheme, arrangement or contract of which I am or have been a member, and I authorise the giving of such information and details. I also consent to any deduction of contributions set out in this application form. I confirm that I have received the Member Information Booklet and that I have read and fully understand parts of the above declaration and that I will be the beneficial owner of any benefits payable in accordance with the trust deed and rules.	all
Signature of Employee	

Date

Employee: Please sign and date.

X

Data Protection Notice

About this Notice

Everyone has rights with regard to the way in which their personal data is handled. During the course of our activities we will collect, store and process personal data about you. The purpose of this Notice is to set out some information on the collection and processing of your personal data. Further information can be obtained in our Privacy Policy which is available at www.zurich.ie/privacy-policy.

The Data we collect

We collect the following personal data ('Data') from you (unless you are a member of a group scheme, in which case we may collect the Data from your employer or the trustee of the scheme):

- Contact and identifying information such as title, name, address, email, telephone number, gender, marital status, date of birth, occupation, PPS number, nationality, country of residence and photographic identification. We require this Data to identify you, contact you, conduct a suitability assessment (in the event of a sale via a financial advisor employed by or tied to Zurich Life), to fulfil our contract with you and to comply with legal obligations (e.g. performance of antimoney laundering checks). For investment products we also collect your US citizen status and your Tax Identification Numbers from other countries (if applicable) which we require to comply with Revenue law. If you are a member of a group scheme, we may also collect your employer's details.
- Financial information such as bank details, credit/debit card details (where needed) and income details (where applicable). We require this Data so we can assess the premium to be paid, to fulfil our contract with you and to comply with legal obligations.
- Medical condition and health status for protection products and some pension and investment products which
 also offer life and serious illness benefits, we collect medical information relating to: personal habits (e.g. smoking or
 consumption of alcohol), prescription information and medical history. For pension products we may collect disability
 information (e.g. if you apply for an early retirement due to ill health). We require this Data so that we can fulfil our
 contract with you.
- Other sensitive information in certain cases, we may receive sensitive information from which it may be possible to infer your trade union membership, religious or political beliefs (e.g. if you are a member of a group scheme through a professional, trade, religious, community or political organisation). In addition, we may obtain information about your criminal record or civil litigation history in the process of preventing, detecting and investigating fraud. We may obtain your PEP (politically exposed person) status, which is necessary for compliance with anti-money laundering legislation.

Data collected from third parties

We may collect Data from third parties if you engage with us through a third party e.g. through a financial broker/advisor or, in the case of a group scheme, through your employer. We do this in order to fulfil our contract and provide services to you. We may also obtain Data from third parties so that we can assess a claim.

What do we do with your Data?

We collect and process this Data to manage and administer our relationship with you. We may use, process and store the Data, for the following purposes:

- Risk evaluation, product suitability, policy execution, premium setting, premium collection, claims assessment, claims processing, claims payment, to provide annual statements, to create trustee annual reports (in the context of group schemes), for statistical evaluation, for survey purposes or to otherwise ensure the Group service delivery. Zurich Life or other members of the Group may contact you in connection with these purposes. We do this in order to provide you with the services for which you have contracted with us.
- We may check the Data you have provided against international/economic or financial sanctions laws or regulated listings to comply with legal obligations (e.g. anti-fraud and anti-money laundering requirements) or otherwise to protect our legitimate interests and/or the legitimate interests of others.

Sharing of Data

In order to provide a seamless service, we may share your Data (where appropriate):

- With other companies in the Group such as branches, subsidiaries, affiliates within the Group, partners of the Group, coinsurance and reinsurance companies located in Ireland and abroad, including outside the European Economic Area ('EEA').
- If you apply for, or purchase, one of our products through a financial broker/advisor or another third party (e.g. your
 employer if you are a member of a group scheme), we will, as appropriate, correspond with that third party in relation
 to your products: this may result in us sharing your Data with that third party.
- Without your consent or without consulting you, when we believe that it is appropriate to comply with our legal
 obligations, a Court Order or to cooperate with State bodies (e.g. Revenue, the Central Bank, The Pensions Authority
 and law enforcement agencies).
- On the sale, transfer or reorganisation of our or our Group's business (or any part of it).
- With business partners, suppliers and sub-contractors with whom we work and/or engage (e.g. auditors, cloud service
 providers, medical professionals, third-party claim administrators and outsourced service providers) to assist us in carrying
 out business activities which are in our legitimate business interest and where such interests are not overridden by your
 interests.
- · In order to enforce this Notice or other legal rights, to protect the security and safety of others, and to prevent fraud.

For further information with respect to the third parties that we may share Data with, please see our Privacy Policy which is available at www.zurich.ie/privacy-policy.

Data Protection Notice (continued)

Where transfers of Data take place outside the European Economic Area ("EEA"), we ensure that they are undertaken lawfully and in accordance with appropriate safeguards. Data may be transferred to, and stored outside the European Union ("EU") or EEA and in a country for which there is no adequacy decision relating to the safeguards for Personal Data from the European Commission. In such instances, appropriate safeguards are put in place to protect your Data. For further information with respect to the non-EU or non-EEA countries to which your Data may be transferred and for which there is no adequacy decision relating to the safeguards for Personal Data from the European Commission or for a copy of the safeguards put in place to protect your Data, please see our Privacy Policy which is available at www.zurich.ie/privacy-policy.

If you have any questions about your Data, you can contact our Data Protection Officer, free of charge, using the contact details below.

Marketing

Depending on the marketing preferences you have expressed in any application forms for our products or services, we may send you details of offers and news that we would like to share with you. Please note that you have the right to change your preferences at any time by contacting us by phone on 01 799 2711, by email at customerservices@zurich.com, or by writing to Customer Services, Zurich Life Assurance plc, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin.

Data Retention

The time periods for which we retain your Data depend on the purposes for which we use it. We will keep your Data for no longer than is required or permitted. For more detail, see our Data Retention Policy at www.zurich.ie/privacy-policy.

Data Subject Rights

You have the following rights in relation to your Data which is held by Zurich Life:

- 1. To ask for details of your Data held by us.
- 2. To ask for a copy of your Data.
- 3. To have any inaccurate or misleading Data rectified.
- 4. To have your Data erased.
- 5. To restrict the processing of your Data in certain circumstances.
- 6. To object to the processing of your Data.
- 7. To transfer your Data to a third party.
- 8. A right not to be subject to automated decision making.
- 9. The right to receive notification of a Data breach.
- 10. Where processing is based on consent, the right to withdraw such consent.
- 11. The right to lodge a complaint to the Data Protection Commission.

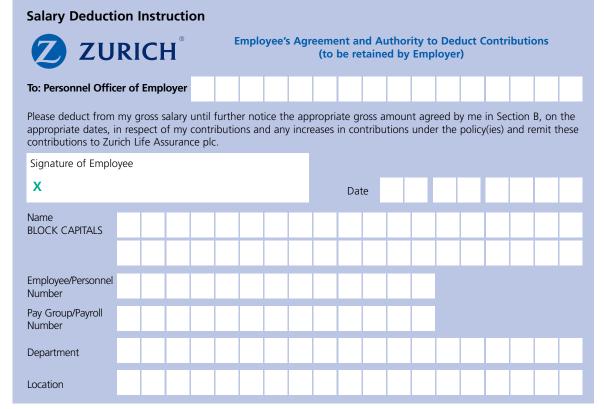
If you wish to avail of these rights, a request must be submitted in writing to our Data Protection Officer. In order to protect your privacy, you may be asked to provide suitable proof of identification before we can process your request.

Our Data Protection Officer is contactable by phone, email, or post via:

- Zurich Life Customer Services on 01 799 2711
- dataprotectionofficer@zurich.ie
- Data Protection Officer, Zurich Life, Zurich House, Frascati Road, Blackrock, FREEPOST, Co. Dublin.

Privacy Policy

Please note that this Notice is not a stand-alone document and should be reviewed in conjunction with our Privacy Policy which is available at www.zurich.ie/privacy-policy.





Employee: Please sign and date.





Halligan Insurances

William Norton House, 575 North Circular Road, Dublin 1. Telephone: 01 873 1033 Fax: 01 873 1978 Website www.halligan.ie

Halligan Life and Pensions Limited, trading as Halligan Insurances, is regulated by the Central Bank of Ireland.

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Zurich Life Assurance plc

Zurich House, Frascati Road, Blackrock, Co. Dublin, Ireland.

Telephone: 01 283 1301 Fax: 01 283 1578

Website: www.zurich.ie

Zurich Life Assurance plc is regulated by the Central Bank

of Ireland.

The information contained herein is based on Zurich Life's understanding of current Revenue practice as at March 2019 and may change in the future

Intended for distribution within the Republic of Ireland.