

MEMBERSHIP APPLICATION FORM

THE LAW SOCIETY RETIREMENT TRUST SCHEME

You must complete this form to confirm your application for membership of the Scheme for retirement benefits and to register your contribution and investment decisions about the Scheme. You can also submit a fresh copy of this form if you wish to update your choices in the future.

Please use **black ink** and **BLOCK CAPITALS** throughout.

You should return this form to The Law Society of Ireland Retirement Trust Scheme, Mercer, Charlotte House, Charlemont Street, Dublin 2.

YOUR PERSONAL DETAILS	
FULL NAME	
ADDRESS	
PERSONAL EMAIL	
DATE OF BIRTH	d d m m y y y y
MOBILE	

YOUR CONTRIBUTIONS TO THE SCHEME	
Please choose your contribution rate by writing in the amount you wish to contribute and how often you wish to make a contribution.	
REGULAR CONTRIBUTION	FREQUENCY
SINGLE PREMIUM	TRANSFER VALUE

YOUR ANTI MONEY LAUNDERING DOCUMENTATION

To complete your membership you must comply with the Criminal Justice (Money Laundering and Terrorist Financing) Act 2010 (as amended) and as such it is required that you submit the documentation set out below with your application (select one option):

ORIGINAL DOCUMENTATION - ONE DOCUMENT FROM LIST A AND ONE FROM LIST B

CERTIFIED* COPIES - ONE DOCUMENT FROM LIST A AND ONE FROM LIST B

List A - Photographic ID

CURRENT VALID PASSPORT

CURRENT VALID DRIVING LICENCE

CURRENT VALID NATIONAL IDENTITY CARD

*Certified Copies

THESE COPY DOCUMENTS MAY BE CERTIFIED BY ANY ONE OF THE FOLLOWING:

- Garda Siochana/Police Officer
- Practising Chartered & Certified Public Accountant
- Embassy/Consular Staff
- Regulated financial or credit institutions
- Notaries Public
- Practising Solicitors (other than yourself or spouse)
- Justice of the peace
- Commissioner for oaths
- Medical Professional

List B - Non-photographic ID

OFFICIAL DOCUMENTATION/CARDS ISSUED BY THE REVENUE COMMISSIONERS AND ADDRESSED TO THE INDIVIDUAL

OFFICIAL DOCUMENTATION/CARDS ISSUED BY THE DEPARTMENT OF SOCIAL PROTECTION AND ADDRESSED TO THE INDIVIDUAL

CURRENT LOCAL AUTHORITY DOCUMENT

CURRENT STATEMENT OF ACCOUNT FROM A CREDIT OR FINANCIAL INSTITUTION OR CREDIT/DEBIT CARD STATEMENTS

CURRENT UTILITY BILL (LESS THAN SIX MONTHS OLD)

CURRENT HOUSEHOLD/MOTOR INSURANCE CERTIFICATE AND RENEWAL NOTICE

YOUR CONTRIBUTION DECISIONS

I WISH TO MAKE REGULAR CONTRIBUTIONS AND ATTACH A STANDING ORDER MANDATE.

I WISH TO MAKE A ONCE OFF CONTRIBUTION AND ATTACH A SINGLE PREMIUM CONTRIBUTION REMITTANCE FORM.

I DO NOT WISH TO MAKE CONTRIBUTIONS YET, AND DO NOT ATTACH ANY CONTRIBUTION FORMS.

YOUR INVESTMENT OPTIONS FOLLOWING FUND CHANGES

If you don't feel comfortable making investment decisions you can decide not to take an active role in managing your retirement account by selecting the Lifestyle Option. In absence of any investment decision your contributions will be invested 100% in the Lifestyle Option.

Please tick one box below as appropriate.

I WOULD LIKE 100% OF MY CONTRIBUTIONS TO BE IN A LIFESTYLE STRATEGY OPTION:

<input type="checkbox"/>	LIFESTYLE STRATEGY (ARF) – DEFAULT STRATEGY	YOU MUST ENTER 100% TO USE	1	<input type="radio"/>	<input type="radio"/>	%
<input type="checkbox"/>	LIFESTYLE STRATEGY (ANNUITY)	YOU MUST ENTER 100% TO USE	1	<input type="radio"/>	<input type="radio"/>	%
<input type="checkbox"/>	LIFESTYLE STRATEGY (CASH)	YOU MUST ENTER 100% TO USE	1	<input type="radio"/>	<input type="radio"/>	%

OR

I WOULD LIKE ALL OF MY CONTRIBUTIONS TO BE AS FOLLOWS:

The total of your investment choices must equal 100% .		ALLOCATION			
LAW SOCIETY PASSIVE GLOBAL EQUITY (HEDGED) FUND	SPECIALIST FUND	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
LAW SOCIETY DIVERSIFIED GROWTH FUND	SPECIALIST FUND	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
LAW SOCIETY BALANCED MANAGED FUND	SPECIALIST FUND	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
LAW SOCIETY EURO LONG DURATION BOND FUND	SPECIALIST FUND	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
LAW SOCIETY EURO CASH FUND	SPECIALIST FUND	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
The total of your investment choices must equal 100% .		<input type="text"/>	<input type="text"/>	<input type="text"/>	%

If you leave this section blank your Retirement Account will be invested **100%** in the default Lifestyle Option.

YOUR AUTHORISATION

I hereby confirm that I am a member of the Law Society and I have a source of net relevant earnings, and I hereby apply to join the above scheme and agree to abide by its rules.

At Mercer we know how important data privacy is to you. For details on how we collect, handle, store and transfer personal data; what your rights are and how they can be exercised please go to www.merceroneview.ie

I confirm I have been informed about the Mercer Fair Processing Notice and where to find it.

I declare that the answers and information I have provided are true and complete. I declare that I have applied for membership to the Scheme to which this Member Application Form relates and that specific conditions may apply.

I CONFIRM THAT I WOULD LIKE ALL CONTRIBUTIONS MADE TO THE SCHEME BY ME AND ON MY BEHALF TO BE INVESTED ACCORDING TO THE INSTRUCTIONS DETAILED ON THIS FORM.

SIGNATURE	<input type="text"/>	DATE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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