

The following sets out the documents required to setup a Quest Retirement Solutions ARF:

Forms for completion and execution in all instances:

- ARF Application Form – fully completed and signed by client and financial broker as required
- QRS Unit Trust Application for units – signed by client
- BOI Account opening mandate – signed by client

Supporting documents required in all instances:

- Proof of Identity**  
An independently certified copy of one of the following:
  - i. A valid passport or national I.D. card
  - ii. A current EU driving licenceThe photo must be visible, and the identification must be signed and in-date.
- Proof of PPS Number (“PPSN”)**  
An independently certified copy of one of the following:
  - i. Public Services / Social Services Card
  - ii. Drugs Payment Scheme Card/Medical/GP visit card/
  - iii. EHIC (European Health Insurance Card)
  - iv. P60, P45,
  - v. Tax assessment
  - vi. PAYE Notice of Tax Credits
- Proof of Address**  
An independently certified copy of the following evidence of address which must be dated strictly **within 6 months** of your application:
  - A bank statement, credit/debit card statement issued by a regulated credit or financial institution
  - A utility bill (gas, electricity, broadband bill, landline telephone, bin charges)
  - An official document issued from the Revenue Commissioners or Department of Social and Family Affairs addressed to the individual provided it shows the name, address and PPS number – *this document can be issued within the past 12 months*

Additional items (where applicable):

- Cheque for ARF deposit amount, after tax free lump sum, to be made payable to ‘Client’s Name ARF’
- Detailed schedule of assets to be transferred in specie- If Cash only N/A
- Signed and completed Investment Instruction & Declaration form – if looking to arrange investment immediately

Please note that the provision of this product or service does not require licensing, authorisation or registration by the Central Bank and, as a result, it is not covered by the Central Bank’s requirements designed to protect consumers or by a statutory compensation scheme.