PENSIONS IRELAND

Pension adjustment order records

Document checklist for a conversation with your solicitor

Use a separate record for each pension arrangement. This is an organising aid, not a court form, legal advice, valuation or statement of entitlement. Your solicitor confirms the legal requirements and deadlines.

1. Identify the arrangement

- ☐ Record the scheme or policy name, reference and administrator contact.
- ☐ Keep the latest statement, its date and any information requests together.
- ☐ List former employers, membership dates and separate AVC records.

2. Gather the legal and scheme correspondence

- ☐ Keep copies of relevant decrees, orders and administrator replies.
- ☐ Ask your solicitor which arrangements and benefit categories need attention.
- ☐ Ask how the relevant period and percentage apply where an order exists.

3. Track the outstanding questions

- ☐ Flag missing statements or unclear scheme names; do not invent a balance.
- ☐ Ask who will request additional information and how it should be shared securely.
- ☐ Keep retirement benefits and death-in-service benefit questions distinct.
- ☐ Use a general calculator only for its stated purpose, not to value legal rights.

4. Next question / responsible person / follow-up date

Read the guide: pensions-ireland.ie/pension-adjustment-order-documents-ireland/

Keep this completed sheet private. Do not send court documents or PPS numbers through a general website enquiry. No email signup is required to use this checklist.