PENSIONS IRELAND

Technology pension review

Connect employment, company funding, old benefits and overseas questions

Use after the explanation. Keep completed worksheets and personal identifiers private. This document does not confirm eligibility, tax relief, benefit awards or personal suitability.

1. Map each working arrangement

- ☐ Employer or business structure / effective dates: _____.
- ☐ Actual contribution payer and receiving arrangement: _____.
- ☐ Payroll earnings / accounts / variable pay confirmed by: _____.

2. Keep old benefits and new payments separate

- ☐ Old scheme and written leaving options: _____.
- ☐ Last old payment / first new collection instruction: _____.
- ☐ Personal payments ____; employer payments _____.
- ☐ Existing benefits, charges and transfer questions: _____.

3. Use consistent comparison inputs

- ☐ Valuation date / annual earnings definition: _____.
- ☐ Bonus, share awards or exceptional receipts: _____.
- ☐ Currency / annual income versus fund units: _____.
- ☐ Household budget and cash reserves: _____.

4. Resolve international and specialist questions

- ☐ Country / administrator / receiving arrangement, if any: _____.
- ☐ Tax, access and protection questions for both jurisdictions: ___.
- ☐ Accountant or specialist advisor / written reply: _____.
- ☐ Unresolved points / next review date: _____.

This worksheet does not classify employment, decide share-award pension treatment, approve company funding or establish overseas transfer eligibility. Moving country and moving a pension are separate decisions. Calculator outputs are illustrations, not tax calculations or personal recommendations.

Guide: pensions-ireland.ie/technology-contractors-pensions/

Tool: pensions-ireland.ie/pension-calculator/