

APPLICATION FOR SPOUSE'S PENSION AND/OR CHILD PENSION



Information on the applicant

Name: _____ ID No.: _____
Address: _____ Tel.: _____
Post code: _____ Place: _____ E-mail: _____

Information on bank accounts

Bank: _____ Account type number: _____ Account number: _____

Account number must be registered to the name of the applicant.

Fund member information

Name: _____ ID No.: _____

Date of death: _____

Is the surviving spouse assessed as disabled? Yes No If yes, please submit a copy of the disability certificate.

Was the Fund member receiving old age or disability pension at the time of death? Yes No

If the Fund member has funds in the private pension plan of Birta lífeyrissjóður, the document "Yfirlit um framvindu skipta", i.e. a progress report on the settlement of the estate issued by the District Commissioner must be submitted. The balance will thereafter be transferred to the legal heirs.

Information on child pension – children under the age of 19

ID No.:	Name:	Account number:
_____	_____	_____
_____	_____	_____
_____	_____	_____

Comment:

Signature

I understand that through my signature, I provide my consent that the information that I supply in this application is stored and recorded in my transaction history at Birta lífeyrissjóður. All processing of personal information, including the collection, registration, storing and treatment of such information is in accordance with the Act on Data Protection and the Processing of Personal Data and the Data Protection Policy of Birta lífeyrissjóður.

Place and date:

Applicant's signature:

WITHHOLDING TAX IN PENSION FUNDS

PERSONAL TAX ALLOWANCE AND TAX BRACKET



Name: _____ ID No.: _____

Personal tax allowance

Withholding tax must be paid on pension payments as though they were regular wage payments. Income tax is calculated on total wages in excess of ISK 189,714 per month (once personal tax allowance, ISK 59,665, has been taken fully into account).

Specify whether this is a new registration of personal tax allowance or a notification of changes to the personal tax allowance that has been registered with Greiðslustofa lífeyrissjóða (the Pension Funds' Payment Office).

- Notification of new registration of personal tax allowance
- Notification of changed registration of personal tax allowance
- I request to use _____ % of my personal tax allowance as of _____
- I request to use _____ % of my spouse's tax allowance as of _____

Name of spouse: _____ ID No. of spouse: _____

I wish to use the unchanged personal tax allowance: _____ kr.

Tax bracket

It is the responsibility of the pension recipient to notify the Fund of the tax bracket their tax should be calculated from, if not the lowest. This is done by indicating the appropriate tax bracket or sending notification of other monthly taxable income from entities other than Greiðslustofa lífeyrissjóða.

- Tax bracket 1 (31.45% tax on total taxable income up to ISK 409,986 per month)
- Tax bracket 2 (37.95% tax on total taxable income from ISK 409,987 - 1,151,012 per month)
- Tax bracket 3 (46.25% tax on total taxable income more than ISK 1,151,012 per month)

Other taxable monthly income: _____ kr.

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