

# 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 230,206 per month (once personal tax allowance, ISK 72,492 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 (31.49% tax on total taxable income up to ISK 498,122 per month)

☐ Tax bracket 2 (37.99% tax on total taxable income from ISK 498,123 - 1,398,450 per month)

☐ Tax bracket 3 (46.29% tax on total taxable income more than ISK 1,398,450 per month)

Other taxable monthly income: \_\_\_\_\_ kr.

### Signature

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Place and date: \_\_\_\_\_

Applicant's signature: \_\_\_\_\_