

Check list (requirements) for a Deceased Person Application

Applications will ONLY be processed if they include the required documents. If any document is missing, the application will be considered **incomplete** and **not accepted** until the documents have been provided. Please refer to required document checklist below for your application type. Original documents are required for sighting.

OFFER OF ANY FORM OF GIFT OR CASH TO ANY STAFF TO PROCESS YOUR PENSION BENEFIT IS STRICTLY PROHIBITED

Call 012716000 to report any request for gift or cash

{Please tick box (X) to indicate all documents provided}

1. Application Form

Where there are multiple administrators on the Letter of Administration (LOA), any one of the named administrators can **initiate** the application process .

2. Death Certificate

A copy of the death certificate is required.

3. Will admitted to Probate or Letter of Administration (LOA) or *Sealed Order

a) The Will/Probate Letter should indicate the existence of a pension account with the PFA on the inventory of assets; otherwise the applicant is required to provide a LOA.

b) The LOA is also required where the deceased client died intestate i.e. without a valid will.

c) Sealed Order obtained from Upper Area Courts/Area Courts (*applicable to Northern states only)

PLEASE NOTE THAT the LOA must include "**Pension with Stanbic IBTC Pension Managers Limited**" on the inventory of assets.

4. Passport Photograph

a) For record purposes, we require a copy of the deceased's passport photograph.

b) We also require passport photographs of the named administrator(s) on LOA.

5. Police Report

A police report should be provided where the cause of death was a road traffic accident.

6. Public Sector Deceased Clients without Accrued Benefits

For deceased clients (in Public Sector) whose accrued benefits have not been remitted into the Retirement Savings Account (RSA), the named administrator(s) will be required to provide the following documents which will be forwarded to the Commission. Pay slips must be stamped and signed if the pay slip was not electronically generated:

a) Death Notification Form properly filled by the named administrator

b) Letter of first appointment of the deceased.

c) Copy of age declaration or Birth certificate of the deceased

d) Last pay slip within the month of demise.

e) Pay slip as at 30 June 2004

f) Pay slip as at January 2007

g) Pay slip as at June 2010

h) Letter of introduction from MDA (i.e. deceased's employer) stating date of first appointment, date of birth, date of death, salary structure, grade level and step as at June 2004, January 2007, June 2010 and as at the month of death, effective date of transfer (where applicable) and the name of the NOK. **This letter is to be signed by an Officer in the Personnel Dept. (whose rank is not below an Assistant Director) and the Pension Desk Officer of the MDA**

i) Last promotion letter before demise.

j) Evidence of transfer of service. (where applicable)

k) Death certificate or evidence of death.

7. Original Bond Certificate & Clearance Letter (Employees of Lagos State only)

a) Original certificate received during Bond ceremony.

b) The named administrator(s) is to complete the Lagos State's clearance process on behalf of the deceased to enable the Government issue a clearance letter to Stanbic IBTC Pension Managers Ltd (SIPML).

PLEASE NOTE THAT self-funded Lagos State institutions are not required to submit bond certificates.

8. Confirmation Letter (Private Sector Clients and Self-Funded Government Organisations Only)

A letter will be sent from SIPML to the client's previous employer to confirm remittance of all contributions into the client's RSA. The application can only be processed for approval from the National Pension Commission on receipt of the employer's response.

9. Bank Account Details

The named administrator must fill his/her valid **bank Account Number** on the application form.

PLEASE NOTE THAT where there are multiple administrators on the LOA, payment will be made into either an estate account or a **jointly nominated** bank account. Where it is the latter, a **Letter of Consent, jointly signed** by all named administrators will be required.

10. Means of Identity

Valid means of ID for the named administrator(s) is any **ONE** of the under listed:

a) National Identity Card

b) Valid International Passport

c) Valid Drivers' License

d) Permanent Voter's Card

e) *Letter of confirmation of identity from the bank (this must be on the bank's letter head paper and duly stamped and signed)

f) *Letter of confirmation of identity from a Notary Public (this must be on the notary public's letter head paper and duly signed and sealed)

*Passport photograph of the named administrator must be on the letter duly stamped by the issuer.

PLEASE NOTE THAT the means of ID must be **valid** at the point of submission and a minor who is not yet of age and does NOT have any of the above means of ID should be confirmed by a Notary Public.

11. Indemnity Form

This form is available at any of our branches/locations and is to be filled and duly signed by the named administrator(s) on the LOA.

12. Obituary (Optional)

A copy of the obituary or evidence of burial from an Imam or Priest can be attached to the application.