

# Check list (requirements) for Employee Portion 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 while clients' resident abroad can submit **notarized** copies of their documents via email.

**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**

## Definitions

"ID" means Identification

"RSA" means Retirement Savings Account

"SIPML" means Stanbic IBTC Pension Managers Limited

"Applicant" means the person making the application.

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

### 1. Application Form

a) This is the duly completed and signed application form which clearly states the client is applying for the Employee portion of the contributions in his/her RSA.

b) The RSA holder's signature on the application must be the same as that on our records.

Accountant General of the Federation (OAGF).

(c) Any inclusion of pension benefits in the payslip would nullify the application

### 2. Passport Photograph

One passport photograph of the applicant is required.

### 3. Birth Certificate/Age Declaration

a) It is required that the client provides his/her birth certificate.

b) In the absence of a birth certificate, an age declaration from the Court will suffice.

**PLEASE NOTE THAT** the age on the birth certificate/age declaration must be the same as the age on our records.

### 4. Letter of Appointment

a) The official letter of appointment is required

b) In the absence of a letter of appointment, a copy of the official gazette with the client's name listed will suffice.

### 5. Retirement/Disengagement letter

The retirement/disengagement letter (which should be on the letter head of the employer) must state the effective date of retirement.

### 6. Last Payslip (Federal Government Retirees Only)

The pay slip must be within 3 months of the client's retirement (for example, where a client retired 31 Dec 2008, the payslip to be submitted should be for Oct, Nov or Dec 2008). It must also be stamped and signed if the pay slip was not electronically generated.

### 7. Retiree Severance Payslip (Disengaged Federal Government Retirees Only)

a) This is required for disengaged retirees ONLY

b) This must be issued by the Office of the

### 8. Pension Registration Certificate (This is provided by the PFA)

This is evidence of the client's RSA.

### 9. Means of Identity

Valid means of ID 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 applicant 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.

### 10. Bank Account Details

The client must fill his/her valid **bank account number** (not a 3<sup>rd</sup> party's account) on the application form. It is important that account names match what is on our record to prevent payment returns by the bank.