

Check list (requirements) for Pre-Act Application

Applications will ONLY be processed if **ALL** required documents are provided. 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

"SIPML" means Stanbic IBTC Pension Managers Limited.

"RSA" means Retirement Savings Account

"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 Pre-Act contributions from his/her RSA.

PLEASE NOTE: RSA holder must have Jan-Dec 2005 contributions in his/her RSA to qualify for Pre-Act.

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

2. Passport Photograph

One passport photograph of the applicant is required.

3. Exit letter from Employer

The exit or retirement letter (which should be on the letter head of the employer) must state the effective date of exit from the Employer.

4. Staff Handbook

A copy of the staff handbook which contains details of the terms and conditions of employment and also indicates the mode of payment for Pre-Act pension/gratuity entitlements is required.

5. Bank Account Details

The client must fill his/her valid bank account number (not a 3rd 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.

6. Confirmation letter (for employees who cannot produce the employee handbook or where the employee handbook is silent on pre-act disbursements)

A letter will be sent from SIPML to the client's previous employer to indicate the mode of payment of Pre-Act contributions in the RSA. The application can only be processed for approval from the National Pension Commission on receipt of the previous employer's response.

7. Means of Identity

A valid means of ID can be 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, 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, 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.