

Check list (requirements) for Voluntary Contribution 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}

Please NOTE that income earned on Voluntary Contributions is subject to Personal Income Tax where withdrawn within 5 years

1. Application Form

a) This is the duly completed and signed application form which clearly states the client is applying for voluntary contributions from his/her RSA.

b) Signify whether the application is for part (state amount) or all the voluntary contributions

c) 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. 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.

4. 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.

5. Acceptance of Tax

A letter confirming the acceptance of the applicable tax to be deducted should be duly signed by the applicant.

PLEASE NOTE THAT the means of ID must be **valid** at the point of submission.