

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.

b) The named administrator(s) is to complete the State's (Lagos & Osun) clearance process on behalf of the deceased to enable the Government Issue a clearance letter to Stanbic IBTC Pension Managers Ltd (SIPML).
PLEASE NOTE: Self-funded Lagos State institutions are not required to submit bond certificates.

2. Death Certificate

A medical certificate of death is required where the deceased died in a hospital and death certificate from National Population Commission (NPC) where the deceased died outside a hospital. Please note that the document presented for the issuance of NPC certificate is required.

**Where the RSA holder died in a hospital outside Nigeria, the beneficiaries are to depose to an affidavit confirming same*

9. Confirmation Letter (Private Sector Clients and Self-Funded Government Organizations 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.

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) The Birth Certificate or Age declaration for any minor on the LOA should be provided

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

e) The application should be submitted for processing in the same State the court that issued the LOA is located. Otherwise, the LOA should be **re-sealed** in the different State that the application will be submitted.

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

10. Letter of Retirement and Verification Slip

Beneficiaries of deceased retirees of Treasury funded MDA are to provide both documents while beneficiaries of deceased retirees from Private Sector and Self-Funded Agencies are to provide the deceased's Retirement Letter only

11. Letter of Attestation from Notary Public

Beneficiaries of deceased retirees on programmed withdrawal are also expected to provide an attestation from a Notary Public stating the demise of the retiree.

12. Bank Account Details

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

a) where there are multiple administrators on the LOA, payment will be made into either an estate account or a **jointly nominated** bank account and a **Letter of Consent, jointly signed by** all named administrators will be required.

b) where any co-administrator is resident abroad, payment would only be made to an Estate account to which all the administrators are joint signatories and a reference letter from the Bank to this effect is required.

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.

13. Means of Identity

Valid means of Identification of the beneficiary. This could be any of the under listed:

- i. National Identity Card/NIN Slip
- ii. Valid International Passport
- iii. Valid Drivers' License
- iv. Bankers' confirmation of identity (passport affixed & stamped by the banker)

*The means of ID must be **valid** (not expired) at the point of submission and those issued abroad must be notarized in the country of residence*

5. Police Report

A police report should be provided where the cause of death is by accident.

6. Employer confirmation (Applicable to only employees that died in active service)

A letter will be sent from Stanbic IBTC Pension Managers Ltd (SIPML) to the client's previous Employer requesting confirmation of the death of the employee.

7. Indemnity Form

This form is available at any of our branches/locations and is to be filled and duly signed.

8. Original Bond Certificate (Lagos State retirees only) & Clearance Letter (Lagos & Osun State retirees only)

a) Original certificate received during LASPEC Bond ceremony.

14. For public sector deceased employees whose Accrued Benefits were not remitted into the Retirement Savings Account (RSA) before demise, the beneficiaries will be required to provide the following documents which will be forwarded to the Commission:

- a) Death Notification Form properly filled by the beneficiary
- b) Valid means of identification of the beneficiary. This could be any of the under listed:
 - I. National Identity Card
 - II. Valid International Passport
 - III. Valid Drivers' License
 - VI. Bankers' confirmation of identity (passport affixed & stamped by the banker)
- c) Letter of first appointment of the deceased
- d) Copy of age declaration or Birth certificate of the deceased
- e) Copy of Authenticated (stamped) pay slip for the following periods;
 - ✓ Pay slip as at 30 June 2004
 - ✓ Pay slip as at January 2007
 - ✓ Pay slip as at July 2010
 - ✓ Pay slip as at December 2013
 - ✓ Pay slip as at December 2017
 - ✓ Pay slip as at the current year and month of demise
- f) 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, July 2010, December 2013, December 2017, the current year and the month of demise, the 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**
- g) Last promotion letter before demise
- h) Evidence of transfer of service (where applicable)
- i) Death certificate or evidence of death

14. Additional documentation (optional)

- ❖ Burial warrant issued by a Local Government Council
- ❖ Evidence of Death/Burial issued by an Islamic Community Head or Judge of a Sharia Court.
- ❖ Evidence of Death/Burial issued by a Leader of a registered church.
- ❖ Copy of obituary poster (if any)

Note:

>> Personal income tax deductions would be applied (where applicable) to deceased clients with VC balances.

If you feel your application has been unduly delayed or are aggrieved by all the application process, please notify us through our 24-hours 7 days a week multilingual contact center on 01-2716000 or send an email to pensionsolution@stanbicibt.com