CC/FOM/V1

Stanbic IBTC
Pension Managers
RC 510990

Checklist Personal Pension Plan Application

☐ **Application Form**

☐ **Passport Photograph**

☐ **Means of Identity**
Valid means of ID is any ONE of the under listed;
- Valid International Passport
- Valid Driver's License
- NIN Slip/ NIMC Card

☐ **Letter of employment (where applicable)**
This is to establish employment

☐ **Exit Letter from Employer (where applicable)**
The letter (which should be on the letter head of the employer) must state the effective date and mode of exit.

☐ **Evidence of total annual emolument**

☐ **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

☐ **Programmed Agreement (where applicable)**

Stanbic IBTC Pension Managers Limited requires the original copy of the programmed withdrawal agreement.

☐ **Completion of Data Recapture**
The Data Recapture Exercise must have been completed before an application can be processed

Notes

Applications will only be processed if they include all the required documents listed above. If there are any outstanding documents, the application will be considered **incomplete** and **not accepted** until all documents are provided.

Please tick box to indicate documents provided

If you feel your application has been unduly delayed or are aggrieved by the application process, please notify us through our 24-hours 7 days a week multilingual contact centre on 02012716000 or send an email to *PensionSolution@stanbicibtc.com*

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PERSONAL PENSION PLAN WITHDRAWAL FORM

This Withdrawal Form is in line with sections 11 and 12 of the Personal Pension Plan Guidelines

Wherein, I ……..of……do hereby declare that I have been properly enlightened on the options for withdrawal.

Please find below details of my information provided and the agreed retirement benefit pay-out.

APPLICANT'S PERSONAL INFORMATION AND BENEFIT PAY-OUT	
RSA PIN	
BVN	
NIN	
Date of First Appointment **(applicable to RSA holders in formal employment)**	
Mobile Number	
State of Residence	
E-Mail Address	
Personal Pension Plan Category	**Active** ☐ **Retiree** ☐
Taxpayer's Identification number (TIN) for tax remittance*	*where your TIN is not provided Stanbic IBTC Pension Managers Limited (SIPML) will not be able to provide tax receipt in your name
Personal Pension Plan Balance	
Contingent ₦	**Amounts Requested ₦**
Bank Name	**Bank Account Number**

Note: Personal Pension Plan (PPP) withdrawal is subject to personal income Tax Act (PITA) where it is withdrawal within 5 years of remittance. The Tax is charged on earned income in line with PITA and the applicable tax chargeable can be up to 24% of income earned.

☐ I hereby acknowledge that I have not provided my TIN and as a result. Stanbic IBTC Pension managers will be unable to provide a tax receipt in my name from the relevant tax authorities.

Signature …… Date ……

Customer's Receipt

Please be informed that you will receive a confirmation via SMS or EMAIL acknowledging receipt of your application within 24 hours of submission. If you do not receive this notification, kindly contact our 24-hour, 7-day-a-week multilingual Contact Centre at 02012716000. You can also track your application status via SMS by sending APPLICATION to 30388. SMS costs N10. Free status tracking is available using your secure login details on our website *www.stanbicibtcpension.com*.

Kindly note the following information relating to the benefits Payment Procedure:

1. **Kindly note that payment can only be effected after submission of personal information on the Enhanced Contributor Registration System (ECRS).**
2. **Upon receipt of the letter of confirmation of Accrued pension contributions (Applicable to self-funded/ Private institutions) for respective employers.**

Please note that if there are any outstanding documents, the application will be considered incomplete and not accepted until all documents are provided. Kindly refer to the attached document checklist for your application type.

…….	…….	…….	…….
Customer's name	**Customer's signature**	**Customer's PIN**	**Date of Submission**

…….	…….
Name and Location of Receiving Officer	**Signature of the receiving officer**