

Checklist (requirements) for Enbloc 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

"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 his/her total RSA balance enbloc

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. Birth Certificate/Age Declaration

It is required that the client provides his/her birth certificate or an age declaration from the Court.

PLEASE NOTE THAT the age on the birth certificate/age declaration must be the same as the age on our records. Change of name documents are required where the names (surname inclusive) on the birth certificate/age declaration differs from the one on our records

4. Retirement Letter

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

5. Confirmation Letter (Private Sector Clients and Self-Funded Government Organisations only)

a) A letter will be sent from SIPML to the client's previous employer to confirm remittance of all contributions into the client's RSA, length of service as well as client's date of birth. The application can only be processed for approval from the National Pension Commission on receipt of the above mentioned letter from the previous employer's response.

6. 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.

7. 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.

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

a) Original certificate received during LASPEC Bond ceremony.

b) Retirees of Lagos and Osun State are to complete the State's clearance process to enable the Government issue a clearance letter to SIPML.

PLEASE NOTE THAT retirees of self-funded Lagos State institutions are not required to submit bond certificates.

9. Completion of Data Recapture (mandatory)

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 01-2716000 or send an email to pensionsolution@stanbicibtc.com

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**The Managing Director
Stanbic IBTC Pension Managers Ltd
Plot 1678 Olakunle Bakare Close
Victoria Island
Lagos**

Dear Sir

CONSENT TO PROCEED WITH ENBLOC APPLICATION PROCESSING BASED ON AVAILABLE BALANCE IN MY RETIREMENT SAVINGS ACCOUNT (RSA)

I hereby authorize Stanbic IBTC Pension Managers Limited to proceed with the processing of my Enbloc application (“the Application”) dated ----- which will enable me access the total balance available in my Retirement Savings Account (RSA) as at -----

I have been made aware that there may be some outstanding pension contributions yet to be remitted by my former employer into my RSA account. I have equally been informed that in the event that any outstanding pension contribution are remitted after this enbloc withdrawal from my RSA, and such remittance increases my total RSA balance from inception till date of final remittance to a value above N550,000.00 (Five Hundred and Fifty Thousand Naira only), such outstanding pension contribution would automatically become subject to the programmed withdrawal or annuity payment option in accordance with the provisions of the Pension Reform Act 2014 and relevant rules and regulation applicable to this mode of withdrawal.

Yours faithfully

NAME:

RSA PIN: PEN

SIGNATURE & DATE: