

CHECKLIST

REQUEST FOR ANNUITY

1. **DULY COMPLETED STANDARD NOTICE OF RETIREMENT FORM*** ☐
To be issued by IEI Anchor official or downloaded from our website: www.ieianchorpensions.com
2. **HAND WRITTEN APPLICATION FOR PAYMENT FROM RETIREMENT SAVINGS ACCOUNT (RSA)** ☐
Letter should be addressed to the Managing Director/CEO, IEI Anchor Pension Managers Ltd., 51A Oro Ago Crescent, Garki II, Abuja. The RSA holder's signature on the application must be the same as that on our records.
3. **RETIREE INDEMNITY FORM & PROVISIONAL ANNUITY AGREEMENT *** ☐
IEI Anchor requires the original copy of Indemnity form signed by the client & stamped in a court of Law
The original annuity agreement must be submitted within 2 weeks of statement printout. It must be signed by the client. Also it must be signed stamped and sealed by authorised Signatories of the Insurance company. An independent party is also expected to sign the annuity agreement.
4. **RETIREMENT VERIFICATION FORM *** ☐
To be issued by IEI Anchor official or downloaded from our website: www.ieianchorpensions.com
Duly completed and signed. Signature must be same as that on our data base
5. **RETIREMENT LETTER/TERMINATION LETTER/RESIGNATION LETTER*** ☐
Should be on the letter head of the employer, must state the effective date of retirement and the mode of exit
6. **EMPLOYMENT LETTER** ☐
7. **DECLARATION OF AGE OR BIRTH CERTIFICATE *** ☐
Please **NOTE** that the age on Means of Identification & Birth Certificate must be same as on our records
8. **PASSPORT PHOTOGRAPH *** ☐
2 Passports of the client and 1 Passport of Next Of Kin is required
9. **PAY SLIP WITHIN 3 MONTHS OF DISENGAGEMENT/RETIREMENT DATE *** ☐
Pay Slip must be signed & stamped by former employer
10. **MEANS OF IDENTIFICATION *** ☐
Any **One** of Int'l Passport, National .I.D. Card, Driver License or Voter Card
Please NOTE that Int'l Passport or Drivers license must be at least six (6) months before expiration
11. **BANKER'S CONFIRMATION LETTER/COPY OF CHEQUE LEAF/STATEMENT *** ☐
Stating Account Name, NUBAN Account number & Branch address/Sort Code (Please ensure your account is active and not dormant)
12. **COPY OF RETIREMENT BENEFIT REGISTRATION SLIP *** ☐
For Treasury Funded Federal Government Retirees Only
13. **LETTER OF CONFIRMATION OF PAYMENT OF PENSION CONTRIBUTIONS /ACCRUED RIGHTS*** ☐
For private Sector Retirees & Self-Funded Government Agencies only;
The client's previous employer will confirm in writing the remittance of all contributions into the applicants RSA, Length of Service as well as date of birth of the RSA holder.
IEI Anchor can only process the application for approval from the National Pension Commission upon receipt of the above mention letter from the previous employer.
14. **Official evidence of terms and conditions of service (For client's who retired voluntarily)** ☐

NOTE:

- Original copies of all documents are to be sighted by Officer receiving them.
- Items with an (*) are considered very important.
- This check list should accompany all requests for payments.

FOR OFFICIAL USE

DOCUMENTS CHECKED & VERIFIED BY:

LOCATION:

OFFICER'S MOBILE NUMBER:

SIGNATURE/DATE: