

CHECKLIST

REQUEST FOR LUMP SUM & PROGRAMMED WITHDRAWAL PAYMENT (STATE GOVERNMENT RETIREES)

(RSA Holder that is over 50 years Old, Out of Work and has > N550,000 .00 in their Account)

1. **DULY COMPLETED STANDARD NOTICE OF RETIREMENT FORM***
To be issued by IEI Anchor official or downloaded from our website: www.ieianchorpensions.com ☐
2. **DULY COMPLETED NEXT OF KIN VERIFICATION FORM ***
To be issued by IEI Anchor official or downloaded from our website: www.ieianchorpensions.com ☐
3. **HAND WRITTEN APPLICATION FOR PAYMENT FROM RETIREMENT SAVINGS ACCOUNT (RSA)**
Letter should be addressed to the Managing Director/CEO, IEI Anchor Pension Managers Ltd., 22 Otukpo Street, Off Gimbiya Street, Area 11 Garki, Abuja. (The RSA holder's signature on the application must be the same as that on our records). ☐
4. **RETIREE INDEMNITY FORM & PROGRAMMED WITHDRAWAL AGREEMENT ***
IEI Anchor requires the original copy of Indemnity form signed by the client & stamped in a court of Law. The programmed withdrawal agreement must be signed by the client and witnessed by an independent party. ☐
5. **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 in our data base. ☐
6. **NOTICE OF & CONFIRMATION OF RETIREMENT FROM EMPLOYER ***
Should be on the letter head of the employer and must state the effective date of retirement. ☐
7. **EMPLOYMENT LETTER** ☐
8. **DECLARATION OF AGE OR BIRTH CERTIFICATE ***
Please **NOTE** that the age on Means of Identification & Birth Certificate must be same as on our records ☐
9. **PASSPORT PHOTOGRAPH ***
2 Passports of the client and 1 Passport of Next Of Kin is required ☐
10. **PAY SLIP WITHIN 3 MONTHS OF DISENGAGEMENT/RETIREMENT DATE ***
Pay Slip must be signed & stamped by former employer ☐
11. **MEANS OF IDENTIFICATION/ RSA REGISTRATION CERTIFICATE ***
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 ☐
12. **BANKER'S CONFIRMATION LETTER/COPY OF CHEQUE LEAF/STATEMENT ***
Stating Account Name, NUBAN Account number & Branch address/Sort Code (Please ensure the account is active and not dormant) ☐
13. **CLEARANCE LETTER OR LETTER OF AUTHORITY TO GRANT ACCESS TO RETIREMENT SAVINGS ***
Issued by the State Pensions Board stating the retiree's name, PIN, Last Place of Work, GL/Step at retirement, Date of Employment, Date of Retirement, Date of Birth. ☐
14. **LETTER OF CONFIRMATION OF PAYMENT OF PENSION CONTRIBUTIONS & ACCRUED RIGHTS***
The State Pensions Board will confirm in writing the status of all outstanding contributions and accrued rights into the retiree's 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 mentioned letter from the previous employer. ☐
15. **COPY OF RECORD OF SERVICE** ☐

FOR OFFICIAL USE:

- 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.
- The Benefit option consent form should also accompany all requests

DOCUMENTS CHECKED & VERIFIED BY:

LOCATION:

OFFICER'S MOBILE NUMBER:

SIGNATURE/DATE:

Please Note: Receiving Officers with details above would be liable for fake or invalid documents received and forwarded for processing