



APPLICATION CHECK LIST - "FPML" LUMPSUM & PROGRAMMED WITHDRAWAL

This is for applicants that have retired or exited from active service after attaining the age of 50 years and must have an RSA balance not less than N550,000.00 only as at the date of application.

1. Data Recapture Exercise – This is mandatory for ALL RSA holders (Active and Retired)

2. Application Form (Original submitted)

- Benefit application form duly completed and signed which clearly states the client's application type – Programmed Withdrawal.
- The signature on the system must be the same as that on our records.

3. Letter of employment: from the last employers

- The employment letter must be on the company's letter

4. Birth Certificate – Anyone (Photocopy submitted and Original sighted).

- Birth Certificate or Age declaration from court would suffice.
- The age on the birth certificate or age declaration must be the same as the one on our records and must not be less than 50 years as at date of application.

5. Means of Identity – Anyone (Photocopy submitted and Original sighted).

- National Identity Card
- Valid Driver's license
- Valid International Passport
- Permanent Voters Card
- Banker's Confirmation letter or a letter from a Notary public.
- The date of birth on the "ID" must be the same as what "FPML" have on the system

6. Retirement / Exit Letter – Anyone (Photocopy submitted and Original sighted).

- The mode of exit could be RESIGNATION.
- The letter must be on ex-employer's letter head paper and must have effective date of exit.

7. Passport Photograph – (Two clear recent copies submitted)

- Two passport of the applicant is required.

8. Bank Account Details – Anyone

- Cheque leaf with NUBAN number (Photocopy submitted). OR
- Duly stamped recent bank's statement showing Account Name and NUBAN Account Number. (Original or clear photocopy submitted). OR
- Duly signed banker's confirmation letter showing account details i.e. Account Name, Bank Name and NUBAN account number (Original submitted).

9. Pay Slip – (Photocopy submitted)

- A stamped pay slip within the last 3 months of exit from employment.

10. Indemnity and Programmed Withdrawal Agreement Form (Original copy)

- The Indemnity form must be stamped in a court of Law
- The Programmed Withdrawal Agreement must be witnessed by an independent party.
- Both the Indemnity and Programmed Withdrawal Agreement Forms must be duly signed by the client.

11. Bond Slip (Photocopy submitted by PUBLIC retirees only).

- The Federal Government Bond Slips are issued after the verification exercise For the retirees of the Federal Civil service, MDAs etc
- The bond slip must have the retiree's effective date of retirement.
- The bond slip must have the retiree's correct RSA PIN.
- The bond slip must have the retiree's photograph.

12. Confirmation Letter (Original copy must be submitted by Private retirees only)

- A letter from applicant's ex-employer on the employer's letter head paper confirming remittance of all contributions into the client's RSA, length of service as well as client's date of birth which must not be less than 50 years.

13. Acceptance Letter (Original copy submitted)

- This letter contains the computed Lump sum and monthly drawdown figures.
- This must be duly signed by the applicant.

13 **Consent Form:** This is a standard form designed by Fidelity Pension to enable retiree choose between Programmed Withdrawal or annuity after counselling.

14 For **State** Authority to Access Retirement Savings Account (RSA) requires Clearance Certificate.