

APPLICATION FOR REGISTRATION OF A PENSION FUND PLAN
under the Insurance Act, 1995

- 1. Name of Plan
2. Address of Plan
3. Names of Trustees
4. Address of Trustees
5. Signature

A. Particulars of the Plan

- 6. Date of inception of the Plan
7. Number of employees to be covered at inception
8. Financial Year end

B. Type of Plan

State whether :

- 9. Contributory Non Contributory
10. Insured Self-Administered

If the Plan is an insured plan, state whether :

- 11. Deposit Administration Deferred annuity Other

C. Benefits under the Plan

- 12. Is the Plan contribution based ? Or benefit based ?

Indicate whether :

- Money Purchase Final Salary
Career average
Other contribution based Other benefit based

- 13. (a) Is there provision for widow's pension? Orphan's Pension
(b) Should death occur before retirement is a benefit payable?

14. Are benefits guaranteed for a fixed period even though the pensioner dies?
15. Can benefits be transferred from or to another pension plan?
16. Retirement age : Males Females on illness?
17. Retirement benefits : future service
- past service
18. Initial rates of contribution — Employer
- Employee

The following documents are attached :

- | | |
|--|--------------------------|
| Copy of Trust Deed of the Plan | <input type="checkbox"/> |
| Copy of Rules of the Plan | <input type="checkbox"/> |
| The actuarial report on which the plan is based* | <input type="checkbox"/> |
| or | |
| The Plan proposal provided by the insurer* | <input type="checkbox"/> |
| The insurance policy (insured plans only) | <input type="checkbox"/> |
| Copy of receipt for payment of registration fee | <input type="checkbox"/> |

.....
Date

.....
Signature

Notes

- Deferred annuity :** A contract that provides for the payment of a benefit to a member of a group at some designated future date.
- Deposit administration :** An accumulation of contributions in an individual fund out of which annuities are purchased for each person in a group and which becomes payable after that person retires.
- Contribution based plan :** A pension fund plan in which the benefit is based on whatever level of pension the fixed contributions of the employee and the employer can purchase at retirement.
- Money purchase plan :** A contribution based pension fund plan where a specified amount of money is used periodically to purchase an annuity for each employee covered by the plan. The total of the annuities is paid to the employee after retirement.
- Benefit based plan :** A pension fund plan in which the benefit is determined beforehand. The contribution of the employee is fixed ; the employer guarantees the benefits and accordingly the employer's contribution may be variable.
- Career average plan :** A benefit based plan in which the benefit is expressed as a percentage of total earnings over the working life as a member of the plan.
- Finaly Salary plan :** A benefit based plan in which the benefit is expressed as a percentage of final salary (or the average salary over the final 3 to 5 years) for every year of service under the plan.

* Tick appropriate box.