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Affix Passport Picture

Please write your name behind picture

PenTrust Personal Pension Plan

**SMART PENSION**

**Page 1**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PERSONAL DETAILS** | To Be Completed By Member in **CAPITAL** Letters | | | |
| **Surname:** | | **First Name:** | | | **Other Name (s):** |
| **Previous Surname (If Any):** | | | **Other Previous Name(s):** | | |
| **Date of Birth:**  Day Month Year | | | **Gender:**  Male Female | | |
| **Place of Birth (Town, Country):** | | | **Nationality:**  Ghanaian Other (Specify):................. | | |
| **Marital Status:**  Single Married Separated Divorced Widowed | | | | | |
| **Occupation:** | | | | **Mode of Payment:**  **Cash deposit Standing order Mobile money**  **Check Other** | |
| **Residential Address:**  **Region :**  **City:** | | | | **Postal Address:** | |
| **Email Address:** | | | | **Mobile Phone No:** | |

I hereby nominate the persons listed below to receive any benefits due me in the event of my death in the proportions herein indicated

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **BENEFECIARY DETAILS** | | To Be Completed By Member in **CAPITAL** Letters | | | |
| **Name** | **Date of Birth** | | **Relationship** | **Address** | **Phone Number** | | **%Allocation** |
|  |  | |  |  |  | |  |
| **Next of Kin:**  **Tel. No. of Next of Kin:** |  | |  |  | **Total** | | **100** |

I hereby declare that all information provided above is TRUE, COMPLETE and ACCURATE

................................................................... ......................................................................

**Date Signature**

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PenTrust Personal Pension Plan

**SMART PENSION AND SHEPHERD TRUST REGISTRATION FORM**

**Page 2**

**Guidelines for Contribution**

**1. The minimum contribution amount is GHC 50.00**

**2. You may kindly make contribution using any of the following means:**

**Bank MTN Mobile Money (MoMo)**

Bank: **Fidelity Bank** Step 1: Dial **\*170#** on your MTN sim card

Branch: **Ridge Tower** OR Step 2: Select **'Option 2'** (1. MoMo Pay and 2. Pay bill)

Name of Scheme: **PenTrust Personal Pension Plan** Step 3: Select 'Option 1'- **Momo Pay**

Account Name : **PenTrust Personal Pension Plan** Step 4: Enter Merchant ID **555880** (PenTrust Smart Pension)

Account Number:  **1330031697127** Step 5: Enter **contribution amount**

Paid in By: **Name of depositor** Step 6: Enter reference (**full name and phone number**)

Step 7: Enter **MoMo PIN**

**Or any Fidelity Bank agent nationwide. Please call us on 0302 901500 / 0302 900989 for the contact details of these agents.**

**Please complete**

**a. I will start with a monthly contribution of GHC………………………**

**b. My first payment will be in the month of ……………………….**

......................................................................................

Contributor’s Signature

**Terms and Conditions**

**Section 109(2) of the pensions Act 766 amended as Act 883 requires two accounts to be opened for personal pension schemes, savings account and retirement account. 50% of your contributions will go to your savings account while the other 50% will be in your retirement account. Withdrawal from the savings account is allowed after 5 years of contributing. Contributions in the retirement account shall only be paid upon retirement of the contributor or after 10 years of contributing. Please note that pension investments do not offer guaranteed returns, hence returns are subject to change depending on market factors.**

**Official Use Only**

Name of PenTrust Agent:.............................................. Authorising Manager’s Name:...............................................................

Agent Signature:............................................................ Authorising Manager’s Signature:.........................................................

Agency Office:..............................................................

Agency Office Phone Number:......................................

Agent ID:.......................................................................

Agent Phone Number:................................................... PenTrust Seal/Stamp:.........................................................................