CUSTOMER'S CHECKLIST AND LIABILITY STATEMENT

Please find below the list of documents required for the processing of your benefit payment:

S/N	DOCUMENT FOR PROCESSING PERSONAL PENSION PLAN	CHECKED & CONFIRMED BY COLLECTION OFFICER
1	Must have been recaptured	
2	A copy of the Letter of Appointment/Confirmation of Appointment.	
3	RSA Welcome Letter	
4	Letter of Request for Personal Pension Plan	
5	Banker's Confirmation letter/ Statement of account form	
6	Passport photographs	
7	Tax Identification Number	
8	National ID card with **NIN Slip**.	
9	Change of name documents ***(Where applicable)***	
10	Letter of Introduction ***(Where applicable)***	
11	Retirement Letter (Retirees)	
12	**BVN**	
13	Consent Form	

I hereby confirm that I have submitted all the documents listed above on the checklist to Oak Pensions Limited and that the complete documentation was submitted on_____

CLIENT'S NAME **SIGNATURE** **DATE**

Data Protection & Privacy Consent

By submitting this form, you consent to the use, storage, and sharing of your personal information on the above document with authorized third parties, including the National Pension Commission (PenCom), the Pension Fund Custodian (PFC), Telecom Service Providers and for any legal or regulatory requirement which will be solely for pension administration and in line with data protection laws.

Customer Name: _____ Signature: _____ Date: _____

For Official Use: I hereby confirm that the above documents have been checked and comply with requirements in accordance with the benefit administration guidelines and take responsibility for submitted documents that are not complete or are later found to be inadequate by the processing officer.

DOCUMENTATION OFFICER'S NAME **SIGNATURE** **DATE**