Jamaica

APPLICATION FOR EXEMPTION ON CONTRIBUTIONS TO AN APPROVED RETIREMENT SCHEME

(Persuant to Section 13(1)(u) of the Income Tax Act)

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Section A - GENERAL INFORMATION

1. Name of Applicant *(Last, First, Middle)*:

2. Taxpayer Registration Number (TRN): *(branch number)*

3. Applicant's Home Address *(Apt. No., Street No. & Name, Postal Zone, Parish)*

4. Date of Birth (mm/dd/yyyy):

5. Telephone Number:

Section B - EMPLOYMENT INFORMATION

6. Name of Employer:

7. Employer's TRN *(branch number)*

8. Business Address *(Apt. No., Street No. & Name, Postal Zone, Parish)*

9. Employee's Gross Statutory Income

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Section C - DETAILS OF APPLICATION

10. State which Approved Retirement Scheme you wish to join:

▶ PROVEN Rock Approved Retirement Scheme

11. Are you a Deferred Member of a Superannuation Fund/ Retirement Scheme? *(i.e. a former member of the Fund/Scheme who at retirement is entitled to a pension from that Fund/Scheme)*

☐ Yes, (complete questions below) ☐ No, (sign and submit application)

12. State the name of the Fund/Scheme of which you are a member:

▶

14. Will any accumulated contributions be transferred from the Fund/Scheme *(named at 12 above)* to this new Approved Retirement Scheme? . . . . . .

☐ Yes ☐ No

Signature *Date*