PRUDENTIAL INDIVIDUAL RETIREMENT BENEFITS SCHEME
Member Joining Form

PRUDENTIAL
Helping you get the most out of life

Please complete in legible and clear handwriting:

1. PERSONAL DETAILS

Title ☐ Mr ☐ Ms ☐ Mrs _____ Others (Specify)

Full name _____

Date of Birth DATE _____ Gender: Female ☐ Male ☐

ID No./PP No. _____ KRA Pin No. _____

2. Contact Information

Physical address _____

Mailing Address: _____ Code: _____

Telephone No.: Home: _____ Mobile: _____

Town/City _____ Email: _____

3. Employment information

Employment Status: Employed Member ☐ Self-Employed ☐ Other ☐

If you are Employed Member, please provide the following additional information:

Present Occupation	
Employer's Name	
Employer's Address	

4. MODE, FREQUENCY & RATE OF CONTRIBUTION (PLEASE TICK AS APPROPRIATE)

a. MODE OF CONTRIBUTION

Salary Deduction ☐ Bank EFT ☐ Standing order ☐ Cheque ☐ M-Pesa ☐

b. FREQUENCY OF CONTRIBUTION

Monthly: ☐ Quarterly: ☐ Semi-annual ☐ Annual ☐

c. SOURCE OF FUNDS

Employment: ☐ Savings: ☐ Gift/Inheritance: ☐ Sale of Property: ☐ Other: ☐

d. MEMBER CONTRIBUTION RATE

Member Contribution Rate: ☐ .....**% of Basic Salary** ☐ **Ksh**.....

(For fixed Ksh amount, state the amount in words: .....)

e. DEFINED CONTRIBUTION RATE (to be filled by the Contributing Employer)

As the Employer of the above-mentioned Employee, I hereby undertake to make retirement benefits contribution to the Scheme for the Employee during his/her duration of employment at the following Employer Contribution Rate:

Employer Contribution Rate: ☐ .....**% of Basic Salary** ☐ **Ksh Per Month**

(For fixed Ksh amount, state the amount in words: .....)

Authorised Signature. Company stamp. Date.....

5. RETIREMENT AGE (IN YEARS)

Selected Normal Retirement Age: ..... Years. *(Normal Retirement Age should not be below 50 years)*

(If you are an Employed Member, please select the Retirement Age specified by your Employer)

6. RETIREMENT SCHEME ACCOUNT DETAILS

PLEASE DEPOSIT OR REMIT YOUR CONTRIBUTIONS THROUGH THE BANK ACCOUNT PROVIDED OR VIA MPESA

a. BANK INFORMATION

ACCOUNT NAME	ACCOUNT NO.	BANK NAME	BANK BRANCH
Prudential Life Assurance Kenya Ltd	0100 0062 6984 7	Stanbic Bank	Chiromo

b. MPESA PAYBILL

PAYBILL BUSINESS NO.	PAYBILL ACCOUNT NO.
4090751	For any Mpesa transaction, kindly use ID No., Passport No. or Member No. as the paybill account no.

7. BENEFICIARY NOMINATION DETAILS

I hereby request you to consider paying benefits due upon my death whilst a Member of the Prudential Individual Retirement Benefits Scheme ("the Scheme") under the Rules thereof to the under mentioned Nominated Beneficiaries in the proportions shown against each name:

Full Name of Nominated Beneficiary	Date of Birth	Relationship	Contact Details	Share to Allocate (%)

* In case of additional nominees please fill a separate form that must be signed and dated appropriately

Guardian Details (In the event that any of the above-named Nominated Beneficiaries is a minor)

Full Name	Relationship	ID No./PP No.	Contact Details

8. SIGNATURE & DECLARATION

I hereby apply to join the Prudential Individual Retirement Benefits Scheme. I acknowledge that my membership and eligibility for benefits of persons deriving from my membership are subject to the Rules of the Prudential Individual Retirement Benefits Scheme in force from time to time. I further confirm that the information provided herein, including the nominated beneficiaries is true and accurate to the best of my knowledge and shall serve as the only valid expression of my wishes. I agree to revise the information provided in this form, especially whenever my circumstances require so, to keep the Trustee informed of any changes

Member Signature **Date**.....

9. DOCUMENTS RECEIVED –FOR OFFICIAL USE

Document	Status
Copy of ID or Passport	
Copy of KRA Pin	
Details of Previous Scheme (if applicable)	

10. INTERMEDIARY/FINANCIAL ADVISOR DETAILS (IF ANY) –FOR OFFICIAL USE

Advisor Name: ..... Advisor Code: .....

Advisor Signature: Date: .....

Checked and Received By:

Client Relationship Manager .....

Signature: Founder Stamp. Date: .....

SERVICE PROVIDERS:

1. Trustee – **Kingsland Court Trustee Services Ltd**
2. Approved Issuer (Fund Manager & Custodian) - **Prudential Life Assurance Kenya Ltd**
3. Administrator – **Zamara Actuaries, Administrators & Consultants Ltd**