



PANTHERA

IPP Membership Application Checklist

To enable you to enjoy the benefits of your IPP sooner, please take a moment to run through the checklist below. Providing all the documents and filling the relevant fields correctly will ensure that your application will be processed quickly.

Please check you have:

- Fully completed and signed all sections of the IPP Application Form or Employers Application Form.
- Completed the Nominated Dependents / Beneficiaries section (to benefit after your death should there be any residual fund value).
- Included duly certified, clear copies of your Passport and a recent Utility bill.
- Familiarised yourself with the written information of all fees, expenses and running costs of your plan.
- Ensured the Professional Adviser has signed the relevant sections of the application.
- Included the Transferring (existing) pension scheme(s) TRANSFER APPLICATION / DISCHARGE FORM and completed the relevant sections for each transfer. Note: This step can delay the speed of application and movement of funds into the IPP.
- Included certified copies of Employer's Certificate of Incorporation (and Employee's Passport and Utility bill) - only if completing the IPP Employers Application Form

AND if intending to subsequently invest your IPP

- Attached an Investment Mandate (authorisation for the Nominated Investment Manager to perform specific investments on behalf of the Applicant) and Investment Strategy Policy Statement.
- Included the relevant Indemnity Form(s) depending on your investment strategy.

AND if intending to subsequently draw income/lump sum:

- Fully completed and signed all sections of the IPP Payment of Benefits Form if intending to draw your Commutation on Retirement and/or Retirement Income from your IPP.