



Jamaica

APPLICATION FOR EXEMPTION ON CONTRIBUTIONS TO AN APPROVED RETIREMENT SCHEME

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

Section A - GENERAL INFORMATION

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

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

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

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

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5. Telephone Number:

Section B - EMPLOYMENT INFORMATION

6. Name of Employer:

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

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

9. Employee's Gross Statutory Income

\$

Section C - DETAILS OF APPLICATION

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

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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:

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

Yes

No

Signature

Date