



CHECKLIST OF DOCUMENTS FOR PROCESSING OF APPLICATIONS ON EQUITY CONTRIBUTIONS FOR RESIDENTIAL MORTGAGE

NAME OF APPLICANT
PIN NUMBER
PHONE NUMBER
CONTACT ADDRESS
ORGANIZATION
EXPECTED DATE OF RETIREMENT
DATE OF SUBMISSION

- 1. A Letter of Introduction from applicant's employer giving details of his/her employment and the expected retirement date (Mandatory)
2. A verified Property Offer Letter showing value of property, type of property and address of property (Mandatory)
3. A Verification Report on the verification conducted on the property (Mandatory)
4. A copy of the Valuation Report of the property from the Mortgage Lender (Mandatory)
5. A Mortgage Loan Offer Letter showing the Loan Amount, Purpose of Loan, Type of Property and Address of Property (Mandatory)
6. A completely filled Mortgage Loan Application Form with Mortgage Lender (Mandatory)
7. A Bank Statement showing applicant's Account details with the Mortgage Lender (Mandatory)
8. A copy of the applicant's RSA Statement of Account endorsed by Premium Pension Limited (Mandatory)
9. A copy of any valid means of identification like. Drivers' License, National Identity Card or International Passport
10. A signed Indemnity Form from the Mortgage Lender indemnifying Premium Pension Limited on the use of the Equity Contribution (Mandatory)
11. Evidence of payment of difference where 25% of RSA cannot cover the Equity Required (Mandatory)
12. A copy of PENCOR Compliance Certificate from Mortgage Lender (Mandatory)
13. Successful Data Recapture by the applicant (Mandatory)
14. A completed and signed Equity Contribution For Residential Mortgage Application Form with Premium Pension (Mandatory)
15. A completed and signed Indemnity Form by applicant to be sworn and endorsed by a High court of Law (Mandatory)
16. A Completed and signed Consent Form where applicant had accessed 25% of RSA balance due to temporary loss of job (Mandatory)

17. A Completed and signed **Consent Form** to be appropriately ticked when applicant wishes to utilize the Contingent portion of Voluntary Contributions, Legacy, NSITF or Micro Pension Contributions to augment the Equity Contribution required **(Mandatory)**.....

**** Note: items 11 - 14 can be obtained from any of our offices or downloaded from our website.**

For Official Use

I confirm receipt of the above-ticked documents and have sighted the originals of the photocopies received.

Originating Branch.....

Receiving Officer's Name.....

Signature..... **Date:**

Assigned To..... **Date:**

For all enquiries; contact our Call Centre on 09 – 4615701 and/or send Email to csu@premiumpension.com