FCMB Pensions

Inter-Fund Transfer Instruction Form

FOR OFFICE USE

Agent Code

Origin. State

Please take this as authority to effect transfer of my Retirement Savings Account (RSA) or Personal Pension Plan (PPP) balance from (please select only one of the options below):

1. Fund I to Fund II
2. Fund I to Fund VI
3. Fund II to Fund I
4. Fund II to Fund III
5. Fund II to Fund VI
6. Fund III to Fund II
7. Fund III to Fund VI
8. Fund IV to Fund VI
9. Fund Va to Fund Vb
10. Fund Vb to Fund Va
11. Fund VI to Fund I
12. Fund VI to Fund II
13. Fund VI to Fund III
14. Fund VI to Fund IV

Note that an RSA holder that is up to 50 years of age cannot be in Fund I. Without completion of this form, submission of complete retirement documents is constructive notice to move a member from either Fund I, II, III or VI Active to Fund IV which is for Retirees or VI Retiree. Contributions under Personal Pension Plan and Voluntary Contributions are limited to Fund Va (PPP Conservative Fund) or Fund Vb (PPP Growth Fund). Fund VI is purely an Ethical/Non-interest Fund based on choice for both active and retired RSA holders.

RSA Personal Identification Number (PIN) P F N

Surname

First Name

Middle Name

Kindly give reasons below for this transfer request (if any):

……

I declare that I understand the Multi-Fund Structure and accept full responsibility for the outcome of the Investments made by my PFA on my behalf.

I also accept that the Administration Fee (where applicable) on this transfer will be charged to my RSA.

Last Transfer Date: DDMMYYYY

……
RSA Holder (Signature* & Date)

……
Customer Service Officer (Signature & Date)

*Note- Signature must be the same as in our database

CSDInterfund@fcmbpensions.com

FCMB Pensions hereby guarantees adequate protection and privacy of your personal information in line with the Nigeria Data Protection Act (2023) and will ensure at all times that the information/data collected (online or offline) from you will only be used for lawful purposes.