



SATURNIA REGNA PENSION FUND – REGISTERED TRUSTEES

APEX PENSION SCHEME APPLICATION FORM

As part of our risk management procedures, Benefits Consulting Services (BENCON) is required to conduct certain client identification and verification procedures. In this regard, please provide a response in block letters to each of the following questions and sign the declaration.

Please return to us the completed and signed form together with all supporting documentation.

Note: Please note that additional information may be requested for completeness of the KYC.

| | | | | | |
|---|---|--------------|---------------------------------|---------|--------------|
| Date | | | | | |
| First Name | | | | | |
| Surname | | | | | |
| Date of Birth | | | | | |
| Identification Number (Attach NRC as proof of identity) | | | | | |
| Nationality (if not Zambian, please provide valid work/ resident permit) | | | | | |
| Gender (please tick (✓) where it applies) | <input type="checkbox"/> Male | | <input type="checkbox"/> Female | | |
| Source of Income | | | | | |
| Applicant's Contact Details | Tel. (Office): Mobile: Email: Physical/Postal Address: | | | | |
| Nominated Beneficiaries (Attach a separate list of beneficiaries if space is insufficient) | Full Names | NRC/Passport | % | Address | Relationship |
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Declaration of Source of Income

| Primary Source of Income | Company Name | Position | Start Date | End Date | Annual Salary | Allowance (If any) |
|---|--------------|--------------------------|------------------------|----------|-----------------------|--------------------|
| | | | | | | |
| Secondary Source of Income | No | Type of Business Venture | Average Monthly Income | | Average Annual Income | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Current Employment Information <i>(if in formal employment)</i> | | | | | | |
| Company Name | | | | | | |
| Position | | | | | | |
| Start Date | | | | | | |
| End Date (If applicable) | | | | | | |
| Annual Salary | | | | | | |
| Allowances and Benefits <i>(if applicable)</i> | | | | | | |
| Other Income Sources | | | | | | |
| Nature of Income Source(e.g. Business, Informal or Formal employment) | | | | | | |
| Average Monthly Income | | | | | | |
| Average Annual Income | | | | | | |
| <p>Monthly amount to be Invested: K</p> <p>I..... have joined the Apex Pension Scheme, an affiliate to the Saturnia Regna Pension Fund administered by Benefits Consulting Services Limited and managed by African Life Financial Services Zambia Limited. By joining the Apex Retirement Fund, I agree to be bound by the Trust Deed and Rules of the Saturnia Regna Pension Fund. I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that I may be held liable for it.</p> <p>Signed aton this day of</p> <p>Signature</p> | | | | | | |