



CHAMBER OF COMMERCE PENSION PLAN

For official use only:

Member # _____

REFUND
REQUEST
FORM

Company Name _____

Name _____
Last Name First Name Middle Name

Name of Member's Spouse _____
Last Name First Name Middle Name

My last period of employment ended on ____ / ____ / ____ Email _____
DD MM YR

Please indicate the address where all future correspondence is to be directed:

Address _____ Local Telephone _____
 _____ Overseas Telephone (if becoming non-resident) _____

RETIRING

I understand that I am entitled to benefits under the Cayman Island Chamber of Commerce Pension Plan in relation to my employment with the company listed above. I also understand that I can leave my pension benefits in the Cayman Islands Chamber of Commerce Pension Plan where it may grow/decline based on market values and when I reach retirement or early retirement age I may apply for the commuted value of the accumulated contributions to become an approved retirement savings arrangement.

I am of early retirement age (50 – 59) and I have ceased employment effective the date listed above. I would like to apply for an approved retirement savings arrangement. Should I return to work prior to the age of 60 I will immediately inform the Cayman Islands Chamber of Commerce Pension Plan.

I am of retirement age (60+) and would like to apply for an approved retirement savings arrangement.

In consideration of this payment I hereby discharge the Administrator of the Cayman Islands Chamber of Commerce Pension Plan from all further liability whatsoever in respect of my membership of that Pension Plan.

Member Signature _____ Date _____
(as appears on passport)

Refund Request Only

I ceased to reside in the Islands on ____ / ____ / ____
(proof of non-residency may be required) DD MM YR

Please note, refunds are only allowed in the following circumstances:

I understand that I am entitled to pension benefits under the Cayman Islands Chamber of Commerce Pension Plan in relation to my employment with the company listed above. I understand that I can leave my pension benefits in the Cayman Islands Chamber of Commerce Pension Plan where it may grow/decline based on market conditions until I retire or apply for a refund if certain criteria are met.

- 1) The commuted value of the pension is over CI\$5,000 AND
 - a) the member's employment is terminated; AND
 - b) that member ceases to reside in the Islands; AND
 - c) no contributions have been made to a pension plan by, or on behalf of the member for a period of two years or more.

I wish to apply for a refund of the commuted value of my pension benefit. In consideration of this payment I hereby discharge the Administrator of the Cayman Islands Chamber of Commerce Pension Plan from all further liability whatsoever in respect of my membership of that Pension Plan.

- 2) The commuted value of the pension is under CI\$5,000 AND
 - a) the member's employment is terminated; AND
 - b) that member ceases to reside in the Islands.

Member Signature _____ Date _____
(as appears on passport)