



Pension Plan Administrator RSA Application Checklist -
Normal Age of Pension Entitlement
Version: 25 March 2025

1. **Purpose:** This checklist serves to document the requirements for the submission of Retirement Savings Arrangement (“RSA”) applications for members’ access to their pension benefits on the grounds of Normal Age of Pension Entitlement.
2. **Eligibility:**
 - a. Individuals born in 1969 or earlier may apply under the grounds normal age of pension entitlement at age 60.
 - b. Individuals born after 1970 may apply for normal retirement at age 65.
3. **Format:**
 - a. All documents must be scanned to the DLP’s email address, PensionsBenefitsdlp@gov.ky, in PDF format and must be clearly legible, properly signed with the member’s signatures verified.
4. **Required Documentation:**
 - a. **Pension Plan Administrator Letter:** A letter from Pension Plan Administrator outlining the type of request on behalf of the member. This letter must include:
 - i. Total account value, as per the member’s pension statement and converted to CI dollars.
 - ii. Mandatory contribution amount, as determined by the member’s pension statement and converted to CI dollars.
 - iii. Voluntary contribution amount, as contained in the member’s pension statement and converted to CI dollars.
 - iv. If the statement and the letter have different information, then an explanation must be included to explain the reason for any variations.
 - b. **DLP’s Individual Transfer Request:** “Individual Request to Retirement Savings Arrangements – Defined Contribution Plan” form duly signed by both Pension Plan Administrator & Member.



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- c. Valid Government Issued Photo Identification with Member's Signature:
 - i. If the member provides the PPA with the original identification, then the PPA must affix the copy taken with the "Certified to be a true and correct copy of the Original" stamp to confirm they have seen and verified the authenticity of the document.
 - ii. If the member provides the PPA with a copy of their identification, then the copy must be notarized by a Notary Public or witnessed by a Justice of the Peace.
- d. Pension Statement: A copy of the latest member statement which includes:
 - i. the member's name that must be consistent with the valid identification.
 - 1. If the member has changed their name, then supporting documentation must be provided to explain any name variations between the identification and the statement.
 - a. If the member provides the PPA with the original documentation, then the PPA must affix the copy taken with the "Certified to be a true and correct copy of the Original" stamp to confirm they have seen and verified the legitimacy of the document.
 - b. If the member provides the PPA with a copy of their supporting documentation, then the copy must be notarized by a Notary Public or witnessed by a Justice of the Peace.
 - ii. the member's date of birth, as confirmed by the member's photo identification.
 - iii. the member's total account value including a breakdown by mandatory and voluntary contributions, in line with the PPA letter, as per 4(a) above.
- e. English Language Translations: All documents in a foreign language must be translated into English and properly notarised, if copies are provided.