



Jamaica

# APPLICATION FOR EXEMPTION ON CONTRIBUTIONS TO AN APPROVED RETIREMENT SCHEME

(Pursuant to Section 13(1)(u) of the Income Tax Act)

<b>Section A - GENERAL INFORMATION</b>		2. Taxpayer Registration Number (TRN): (branch number)	
1. Name of Applicant (Last, First, Middle):		<div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div>	
3. Applicant's Home Address (Apt. No., Street No. & Name, Postal Zone, Parish)		4. Date of Birth (mm/dd/yyyy):	5. Telephone Number:
		6. Administrator's TRN (branch number)	
		<div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div>	
<b>Section B - EMPLOYMENT INFORMATION</b>		8. Employer's TRN (branch number)	
7. Name of Employer:		<div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 100px; height: 20px; margin: 0 auto;"></div>	
9. Business Address (Apt. No., Street No. & Name, Postal Zone, Parish)		10. Employee's Gross Statutory Income	
		\$	
<b>Section C - DETAILS OF APPLICATION</b>			
11. List the names of all the Approved Retirement Scheme in which you are a member (active and deferred) and indicate the date of admission to the scheme:			
Name of Retirement Scheme	Date of Admission	Status (Active or Deferred)	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
12. What is/are the contribution rate(s) to the active Approved Retirement Scheme(s) listed above?			
Name of Retirement Scheme	Employer's Contribution Rate	Employee Contribution Rate	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
13. Does your employer operate an Approved Superannuation Fund in which you are a member or eligible to join?			
<input type="checkbox"/> Yes <input type="checkbox"/> No			
13a. If 'yes', what date did you become a member or eligible to join?		_____	
14. What is the name of the Approved Superannuation Fund?		_____	
15. What is the contribution rate to the Approved Superannuation Fund in which you are a member?			
Employer	_____	Employee	_____

## Section C - DETAILS OF APPLICATION (continued)

16. What is the nature of employment with your current employer?

☐

Part-time

☐

Full-time

☐

Casual

☐

Contract

☐

Other

17. What is the name of your previous employer?

18. Are you a deferred member of an Approved Superannuation Fund? (i.e. a former member of the fund who at retirement is entitled to pension from the fund)

Yes, (complete questions 19 and 20)

No

19. State the fund(s) of which you were a member:



20. Will any accumulated contributions be transferred from the Fund(s) listed above or the Scheme(s) listed at question 11 to this new Approved Retirement Scheme?

☐

Yes

☐

No

If 'Yes', indicate if it is the fund or the scheme or both

☐

Superannuation Fund

☐

Retirement Scheme

☐

Both

21. Was a previous application made and rejected?

Yes

No

If 'Yes', what was the reason for the rejected application?



## Section D - SUPPORTING DOCUMENTS

Kindly attach the following to the Approved Retirement Scheme (ARS) application form



Copy of ID



Copy of TRN



Copy of application enrollment form to the ARS or annual statement if you are already a member



Copy of pay slip (no older than one month)

## Section E - FOR OFFICIAL USE

To be completed by Tax Administration Jamaica



Is the application form completed?

☐☐

Are all the required documents submitted?

☐☐

Which documents were not submitted?



Is the application approved or rejected?

☐☐

What is the basis of the rejection?

Approved by

Date