

Petra Opportunity Pension Scheme™

Form 14 – Tier 3 Employer Application Form



Instructions: Before you sign this application form, we are obliged to give you a Product Disclosure Statement (PDS), which is a summary of the important information relating to the Scheme. The PDS will help you to understand the product and decide if it is suitable for you. The current version of the PDS, which you should read in conjunction with this form, has a publication date of 26th March 2012 can be found on page 8 of this document

Please complete all sections of this form. This application will be considered incomplete until signed by an authorized representative of the applicant. Please complete this form in Black pen and in BLOCK letters and forward the completed application form to Petra Trust at **113 Airport West, Accra** or call **0242435037** for alternate submission options.

1. Employer Details ▼

a. Organization Name

b. Company Registration Number c. Petra Trust Employer Number (if applicable)

d. SSNIT Number e. Total Number of Employees

f. Tax identification Number g. Industry Code (See next page for list of industry codes)

h. Postal Address

i. City / Town j. Region

k. Street Address

l. Office Location Directions(from a major landmark)

2. Fund Membership Details ▼

a. Month for which your first contribution applies (MM / YYYY)

b. Number of your employees joining this Master Trust at commencement?

c. Contributions will be paid (Select Below)
 Bi-Weekly Monthly

d. Please specify date for contribution payment (Ex. By the 10th of the ensuing month)

Note: If contributions are not paid at the same time for all employees, please advise in an attachment, the basis to apply for each category. For example part-time, casual or different award classification.

e. Contact Person
 Title First Name Middle Name Surname

f. Email Address

g. Phone Number h. Cell Phone Number

3. Provident Fund Details ▼

a. Does the company have an existing Provident Fund (PF) Scheme?
 Yes No

b. If Yes, indicate the total value of funds in your PF as of the last contribution.(Amount and Date [DD/MM/YYYY])
 Amount Date

c. What is the value of the most recent contribution made into the PF?

d. Has your PF been converted into a Tier 3 Scheme?
 Yes No

e. If No, do you plan on converting your PF into a Tier 3?

f. Are the employer and employee contributions fixed? (Kindly state the percentages below)
 Employer Percentage Employee Percentage

g. If not, kindly explain? (Example: Company matches employee's contribution 5% - 5%. Contributions should not exceed 16.5% of gross salary)

4. Vesting Rules For Employer Contributions

a. Will employer contributions vest immediately?

Yes No

b. If No, kindly indicate percentage vested in each year. (The sum of all years should be 100%)

Year 1 Year 2 Year 3 Year 4 Year 5

5. Contact Details

a. Contact Person

Title First Name Middle Name Surname

b. Email Address

c. Phone Number

d. Cell Phone Number

e. Secondary Contact Person

Title First Name Middle Name Surname

f. Email Address

g. Phone Number

h. Cell Phone Number

6. Declaration

I am duly authorized to make this application on behalf of the organisation set out in Section 1 of this application. On behalf of my organisation, I declare that:

- i. my organisation agrees to be bound by the Trust Deed and the Rules Governing the Fund published on May 4th, 2012 and as amended from time to time including policies and determinations made by the Trustee in accordance with the Trust Deed;
- ii. my organization hereby applies to become a 'Participating Employer' (as defined in the Trust Deed) ;
- iii. the information supplied on this application form is true and correct at the date of signing and my organization will notify the Trustee immediately if any of this information changes.

Name of Authorized Officer

Title First Name Middle Name Surname

Email Address

Cell Phone Number

Signature of Authorized Officer

Date (DD/MM/YYYY)

Industry Codes

Business Sector	Code
Automotive	PI01
Aviation	PI02
Construction	PI03
Education	PI04
Engineering	PI05
Financial Services	PI06
Food Processing	PI07
Freight Forwarders/Couriers	PI08
Healthcare	PI09
Insurance	PI10
Manufacturing	PI11
Mining	PI12
Printing	PI13

Real Estate	PI14
Retail	PI15
Security	PI16
Social Service Solicitor	PI17
Telecommunications	PI18
Transport & Distribution	PI19
Travel & Tourism	PI20
Warehousing	PI21
Waste Management	PI22
Wholesalers	PI23
Other (please specify)	PI24
	PI25