

Pensions Administration Branch

Checklist

(Required Documents for Refund of Contributions)

INSTRUCTION:

Please read the instructions overleaf for guidance.

The following documents must be submitted to the Pensions Administration Branch, Ministry of Finance and the Public Service for the calculation of refund of contributions. This checklist is applicable to persons who resign from the public service prior to achieving ten (10) years of service and/or contributed to the scheme erroneously.

Birth Certificate (certified copy)

Statutory Declaration of Age *(Form-PAU-002)*

Marriage Certificate (certified copy)

Decree Absolute (certified copy)

Statement of Contributions

Taxpayer Registration Number (TRN)

Application for Refund (an official letter or Form PAB-011 requesting the refund on the basis that contributions were erroneous **or** resignation with less than 10 years of service)

Cover Letter from Ministry/Department/Agency

Indebtedness

Period of Service Record

Completed Accountant General’s Department Banking Information Form

Bank Account Verification (instructions on AGD Form)

**Information Guide**

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| **The Checklist** | This Checklist serves as a guide to the MDAs of the documents required to be submitted to the Pensions Branch, MoFPS for processing of the refund of contributions made to the GoJ Pensions Scheme. |
| **Statutory Declaration of Age** | Birth certificate must bear the applicants father’s name/or his/her full name should be entered in the 9th/26th column of the birth certificate. If this is not so, the Birth Certificate must be accompanied by a Statutory Declaration of Age (Form-PAU-002)*.*  Statutory Declaration can also be completed by the applicant when there is a variation of name spelling. |
| **Statement of Contributions** | Statement showing all monies deducted from the applicant’s salary for pension contributions and paid into the Consolidated Fund / Accountant General.  The Statement of Contributions must be prepared by Accounts personnel and verified by Internal Audit/ Accounts Directorate. |
| **Cover Letter from Ministry/Department** | This is a letter from the Ministry/Department/Agency submitting the documents to the Pensions Administration Branch, MoFPS outlining the circumstances for the refund request.  Letter must state the reason the application is being submitted for processing. |
| **Indebtedness** | The Ministry/Department must clearly state any indebtedness of the officer to the Government of Jamaica. |
| **Period of Service Record** | Form/Document in the prescribed format detailing an officer’s employment history.  The Service Record should be signed by Head of Department/Head of Section/Unit.  All entries should be initialled.  Appointment, promotion, leave, salary scale and salary paid must be entered.  Period of pre-retirement leave. Memo Ref. No. and date verifying leave should be stated clearly where applicable.    Last entry should be the effective date of retirement/resignation where applicable. |