

## Custodian

TO BE COMPLETED BY CORALISLE		K _ _ _ _ - _ _ _ _		
Employer		DIV.CODE	ERID	
Plan Name		PLANID	NOEE	

### PART 1 MEMBER'S INFORMATION Please PRINT throughout.

First Name \_\_\_\_\_ Middle Initial(s) \_\_\_\_\_ Last Name \_\_\_\_\_  
 Gender  M  F Date of Birth MM/DD/YYYY Marital Status  Single  Married  Divorced  Widowed  
 Mailing Address \_\_\_\_\_  
 Physical Address \_\_\_\_\_  
 Personal E-mail Address \_\_\_\_\_  Driver's Licence or  Passport No. \_\_\_\_\_  
 Contact Nos. \_\_\_\_\_ Termination Date MM/DD/YYYY  
 Reason for Terminating  Change of Employer  Retirement  Leaving Island  Other (specify) \_\_\_\_\_

### PART 2 REQUEST FOR TRANSFER OR PAYMENT OF ACCUMULATED PENSION BENEFITS

Please select ONE (1) of the options below

- 1. Transfer to my new Employer's Pension Plan  
 New Employer Name \_\_\_\_\_ Pension Provider \_\_\_\_\_
- 2. Transfer to a Prescribed Retirement Product as follows
  - BritCay Individual Retirement Account until further notice
  - BritCay Individual Retirement Account for two (2) years (payment instructions must be forwarded to BritCay in due course)
  - Retirement Savings Arrangement (RSA)
  - Other \_\_\_\_\_
- 3. Cash refund (only applicable if amount does not exceed CI\$5,000)

If you are leaving the island, please provide us with forwarding contact information:

Address \_\_\_\_\_  
 Personal E-mail Address \_\_\_\_\_ Tel. No. \_\_\_\_\_

### PART 3 YOUR CONFIRMATION

I understand that, provided all contributions are paid up to date, the redemption of funds takes 6 to 8 weeks and that all applicable bank fees will be deducted from withdrawal amounts.

Member's Signature \_\_\_\_\_ Date MM/DD/YYYY  
 Employer's Signature \_\_\_\_\_ Date MM/DD/YYYY

**British Caymanian Insurance Agencies Limited** BritCay House, 236 Eastern Ave, George Town, Grand Cayman, Cayman Islands  
 PO Box 74, Grand Cayman KY1-1102, Cayman Islands | Tel 345 949 8699 | Fax 345 949 0538 | www.CGCoralisle.com

Pensions and Employee Benefits

**INSURANCE | HEALTH | PENSIONS | LIFE**

A member of Coralisle Group Ltd.

Rev. 08-20

British Caymanian Insurance Agencies Limited acts solely as an agent on behalf of Coralisle Pension Services Ltd.; it does not act as a broker on behalf of its customers. Coralisle Pension Services Ltd. is licensed to conduct Investment Business by the Bermuda Monetary Authority and holds a restricted trust licence with the Cayman Islands Monetary Authority. Please see our General Information and Disclosures page on our web site for more information.