

MEMBER APPLICATION FORM - PURCHASE OF A RESIDENTIAL HOUSE

A. PARTICULARS OF APPLICANT

Surname.....Other Names.....

Date of Birth..... ID/NoKRA PIN.....

Designation.....Employee/Job Group No.....

Employer/Participating Employer.....

DepartmentStation.....

Member/Payroll Number.....

Address.....

Telephone.....Mobile No.....

E-mail.....

Marital status.....Name of Spouse.....

State whether the Applicant and Spouse are members of the same scheme or different Schemes

.....

In the event Spouse is a member of a different Scheme, please provide Scheme name and address

.....

.....

State whether the spouse may combine their accrued benefits with that of the Applicant and utilize the total combined amount for the purchase.....% amount to be assigned by spouse

Spouse’s Mobile No.....Spouse’s ID/No.....No. of Children.....

Next of Kin.....Relationship.....

Next of Kin ID/No.....Next of Kin Mobile No.....

Next of Kin Birth Certificate No.....

List of Beneficiaries

1.....

2.....

3.....

Do you have any physical disability?.....Yes/No. If yes please specify.....

B. TYPE OF ACTION APPLIED FOR:

Tick as relevant

(i) Purchase of residential house

(ii) Purchase of land and residential house

Land Reference No.....

Selling Price.....

- a) Amount applied for Ksh.....
(an amount not exceeding forty per cent of the member's accrued benefits: Provided that such sum shall not exceed seven million shillings)
- b) Amount applied for in terms of member's additional voluntary contributions to top up the portion in a) above of the benefits available to the member for the purchase of the residential house for Ksh.....

NB: Attach/enclose certified photocopies of:

- a) National Identity Card;
- b) KRA Pin Certificate;
- c) Birth Certificate;
- d) one passport size photograph;
- e) Marriage Certificate;
- f) Payslips for the last 3 months,
- g) Annual Pension Statement;
- h) Children’s Birth Certificates;
- i) Next of Kin National Identity Card;
- j) Beneficiary’s identity card and/or birth certificate;
- k) Original Letter from employer confirming continuing employment status;

Where the applicant and the spouse are both members of the same scheme or different schemes and wish to combine their accrued benefits for purposes of the application, the spouse shall provide details herein a) to d) and of their membership to the Scheme and their accrued benefits

C. INCOME DETAILS PER MONTH (KSHS.)

Basic salary	
Rental House Allowance	
Spouse Income (Attach Proof)	
Any other income (Attach Proof)	
Total Income	

D. MODE OF PAYMENT

Accrued /Combined Benefits.....

Others (specify).....

E. BENEFICIARY/NON-BENEFICIARY STATUS FOR SELF AND SPOUSE

Tick as relevant

Have you or your spouse benefitted from the housing early access option?

<p>SELF</p> <table style="width: 100%; border: none;"> <tr> <td style="border: 1px solid black; padding: 5px; width: 50%; text-align: center;">YES</td> <td style="border: 1px solid black; padding: 5px; width: 50%; text-align: center;">NO</td> </tr> </table>	YES	NO		<p>SPOUSE</p> <table style="width: 100%; border: none;"> <tr> <td style="border: 1px solid black; padding: 5px; width: 50%; text-align: center;">YES</td> <td style="border: 1px solid black; padding: 5px; width: 50%; text-align: center;">NO</td> </tr> </table>	YES	NO
YES	NO					
YES	NO					

F. RETURN OF APPLICATION FORMS

Duly completed forms should be submitted to the Trust Secretary.

G. UNDERTAKING

I undertake: -

- (i) To execute an Agreement for Sale with the Vendor
- (ii) To abide by all other terms and conditions of Sale, The Scheme Rules and Rules and Procedures Manual relating to the purchase of a residential house from members Benefits

H. DECLARATION

I..... certify that, the information given above is true and correct to the best of my knowledge and take full responsibility of the same.

Signature.....Date.....

Signature of Spouse in the event there is a combination of benefits

.....Date.....

Witnessed by

Signature.....Date.....

Name.....

Address.....

Telephone.....

J. FOR OFFICIAL USE ONLY

1. Deposit paid
Kshs.

2. Balance to be paid upon Registration
Kshs.

3. Where the applicant is a member of more than one scheme that have been established by the same Employer trustees to combine the member's accrued benefits.
Proportion available to the member if applicable Ksh.....

- 4. Property Details**
- (a) Type of House being purchased
 - (b) L.R. No.....
 - (c) Sale Price Kshs.....

(d) Portion of members accrued benefits Granted to Applicant Kshs.....

(e) Signature of Trust Secretary/Scheme Administrator

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Date.....