

Pension application

Name	ID No.
Address	Postcode and location
Email	Phone/Mobile

Pension rate

- ☐ Full retirement pension (100%)
☐ Half retirement pension (50%)

Payment information

The pension is requested from: month/year*	Bank – sort code – account number
--------------------------------------------	-----------------------------------

* Please note that the pension is disbursed on the last day of each month..

Entitlements in other funds

In accordance with the agreement on relationships between pension funds, this application will be submitted to other Icelandic pension funds to which the fund member has contributed, unless otherwise specified in the application.

- ☐ I request that this application **will not be** submitted to other pension funds to which I have contributed.

Tax brackets

- ☐ Tax bracket 1 (31,49% tax on total taxable income below ISK 498.123 per month)
☐ Tax bracket 2 (37,99% tax on total taxable income ISK 498.123- 1.398.450 per month)
☐ Tax bracket 3 (46.29% tax on total taxable income above ISK 1.398.450 per month)

Or other monthly taxable income: _____

Personal tax credit

- ☐ Utilise _____ % of own personal tax credit, commencing from (date) _____
☐ Utilise accumulated personal tax credit ISK _____

Spouse's personal tax credit

- ☐ Utilise _____ % of spouse's personal allowance, commencing from (date) _____

Name of spouse _____ ID No. _____

I, the undersigned, member of Stapi Pension Fund, hereby confirm that I have familiarised myself with the contents of Article 18.3 in the Fund's Articles of Association which stipulates that by taking out a pension before the age of 67 a fund member has made a final arrangement regarding his/her entitlements to a retirement or disability pension and subsequently has no independent entitlement to a disability pension.

By my signature, I accept that the information I provide in this application will be saved and registered in my transaction history at Stapi Pension Fund. All processing of personal information, including its acquisition, registration, electronic recording and handling is in accordance with the Act on Personal Data Protection and the personal data protection policy of Stapi Pension Fund, published on the Fund's website.

Date	Applicant's signature
------	-----------------------

Application deadline is until the 15th of each month, with regard to payments at the end of the month

Politically Exposed Person

According to Act on measures against Money Laundering and Terrorist Financing No. 140/2018 the applicant is obliged to answer whether at risk as a Politically Exposed Person.

Is the applicant a Politically Exposed Person? ☐ Yes ☐ No

If yes, why are you a Politically Exposed Person?

--

Explanatory notes:

Politically Exposed Person: Natural persons, domestic or foreign, who are or have been entrusted with prominent public functions, together with their immediate family members and close associates.

Individuals entrusted with prominent public function means all of the following:

- a) Heads of state, ministers, deputy or assistant ministers.
 - b) Members of parliament.
 - c) Members of the governing bodies of political parties.
 - d) Supreme court judges, judges on constitutional courts, or other high-level judges sitting in courts the decisions of which are not subject to further appeal except in exceptional circumstances.
 - e) Members of courts of auditors and the supreme officials of central banks.
 - f) Ambassadors, chargés d'affaires, and high-ranking officers in the armed forces.
 - g) Members of the administration, management, or supervisory bodies of state-owned Enterprises.
 - h) Directors, deputy directors and members of the boards of international organisations or international institutions.
- The positions listed in subsections (a)-(h) do not apply to middle managers.

A person's immediate family members are as follows:

- a) The persons spouse.
- b) The person's cohabiting partner in a registered partnership.
- c) The person's children, step-children and their spouses or cohabiting partners in registered partnerships.
- d) The person's parents.

A person's close associates are:

- a) Natural persons who are known to have had joint beneficial ownership of a legal person together with a politically exposed person, or other known associates.
- b) Natural persons who have had a close business relationship with a politically exposed person.
- c) A natural person who is the sole beneficial owner of a legal person which is known to have been established for the benefit of a politically exposed.

Place and date	Applicant's signature
----------------	-----------------------