

SPECIAL ISSUE

Kenya Gazette Supplement No. 87

1087

13th June, 2025

(Legislative Supplement No. 52)

LEGAL NOTICE NO. 110

THE PUBLIC SERVICE SUPERANNUATION SCHEME
REGULATIONS, 2025

ARRANGEMENT OF REGULATIONS

Regulation

PART I—PRELIMINARY

1—Citation.

2—Interpretation.

PART II—OBLIGATIONS

3—Obligation of the employer.

4—General Obligations of members.

5—Obligations of the Trustees.

PART III—GENERAL MEETINGS

6—Annual General Meeting

7—Special General Meeting

PART IV—CONTRIBUTIONS, SAVINGS AND PAYMENTS

8—Additional Voluntary Contributions

9—Retirement Savings Account.

10—Withdrawal from the Retirement Savings Account.

11—Transfer of benefits.

12—Deferment of Benefits.

13—Retirement upon attainment of mandatory retirement age.

14—Early retirement.

15—Payment of Retirement Benefits.

16—Benefits from the Scheme upon death in service.

17—Benefits under Life Insurance.

18—Retirement Benefits accrued before the commencement of the
Act.

PART V – MISCELLANEOUS

19—Dispute Resolution.

THE PUBLIC SERVICE SUPERANNUATION SCHEME ACT

(Cap. 189A)

IN EXERCISE of the powers conferred by section 55 of the Public Service Superannuation Scheme Act, the Cabinet Secretary for the National Treasury and Economic Planning, on the recommendation of the Public Service Superannuation Fund Board of Trustees make the following Regulations—

THE PUBLIC SERVICE SUPERANNUATION SCHEME
REGULATIONS, 2025

PART I - PRELIMINARY

1. These Regulations may be cited as Public Service Superannuation Scheme Regulations, 2025. Citation.

2. In these Regulations, unless the context otherwise requires— Interpretation.

“Act” means the Public Service Superannuation Scheme Act; Cap. 189A

“Board” means the Board of Trustees of the Scheme established under section 10 of the Act;

“Cabinet Secretary” means the Cabinet Secretary for the time being responsible for matters relating to finance;

“employer” includes —

- (a) the Teachers Service Commission;
- (b) the National Police Service Commission;
- (c) the Public Service Commission;
- (d) any other service that the Cabinet Secretary determines to be public service for the purposes of this Act;

“other service” means any other service within the public service as defined in Article 260 of the Constitution other than the public service referred to in section 2 of the Act;

“retirement savings account” means a record of accrued benefits maintained for a member including the contributions made by or on behalf of the member, net of expenses, as well as the investment gains or losses allocated to the member as determined by the Board;

“Scheme” means the contributory Public Service Superannuation Scheme established by section 3 of the Act;

“trivial pension” means an amount which is considered to be small enough to allow it to be paid as a lumpsum as determined by the Retirement Benefits Authority from time to time;

“trustee” means a member of the Board of Trustees established under section 10 of the Act;

“trust fund” means a fund established for the administration of benefits accruing to minors and others beneficiaries lacking in legal capacity.

PART II- OBLIGATIONS

3.(1) Every employer shall—

Obligation of
the employer.

- (a) inform all eligible employees of their automatic membership to the scheme as per section 5 of the Act;
- (b) provide the employees with information about the Scheme;
- (c) ensure the employee completes and submits—
 - (i) the Membership Enrolment Form PSSS 1 set out in the Schedule; and
 - (ii) the Beneficiary Nomination Form PSSS 2 set out in the Schedule.

(2) The employer shall ensure that every new member of the Scheme fills the membership enrolment form and the beneficiary nomination form provided under subregulation (1)(c).

(3) Subject to subregulation (2) the employer shall forward the completed forms to the Scheme.

4.(1) Each member shall—

General
Obligations of
members.

- (a) at first appointment or upon joining the Scheme, complete and submit the Membership enrolment form and the Beneficiary nomination form provided under regulation 3(1)(c) to the employer;
- (b) review and update the Beneficiary Nomination Form where necessary;
- (c) confirm that the employer deducts the correct member's contribution on a monthly basis as provided in the Act;
- (d) scrutinize statements issued by the Scheme to confirm correctness and notify the Scheme in the event the statement contains any error; and
- (e) attend the annual general or special meeting called by the Scheme.

(2) Every member who joined the Scheme before the commencement of these regulations, shall within three months after the commencement of these regulations, complete and submit the Membership Enrolment Form and the Beneficiary Nomination Form provided under regulation 3(1)(c) to the employer.

5.(1) The Board shall—

Obligations of the
Board.

- (a) administer the Scheme in accordance with the provisions of the Act and the Retirement Benefits Act;
- (b) ensure that scheme funds are invested by a manager duly appointed in accordance with the Act;

Cap. 197

- (c) keep proper books and records of account with respect to income, expenditure, liabilities and assets of the Scheme;
- (d) compute and prepare statements of payments of benefits to members;
- (e) liaise with the Retirement Benefits Authority, Government, the employers, members, manager, custodian and any other professionals engaged by the Scheme for the proper administration of the Scheme;
- (f) collect, keep and update retirement benefits data of each member including maintenance of up-to-date individual membership records;
- (g) ensure that the agreed contributions have been remitted to the custodian as required by the Act and these regulations;
- (h) provide members with annual membership benefits statements;
- (i) convene an Annual General Meeting of members;
- (j) conduct member education at intervals to be determined by the Board;
- (k) establish a dispute resolution mechanism for the Scheme;
- (l) ensure that documents intended to bind the Scheme are professionally prepared;
- (m) submit to the Cabinet Secretary, the employers and the Retirement Benefits Authority within a period of three months from the end of the financial year, the audited accounts of the Scheme;
- (n) provide the Cabinet Secretary, the employer and the Retirement Benefits Authority a copy of the agreement entered into with the manager, custodian and administrator of the Scheme;
- (o) submit to the Cabinet Secretary, the employer and the Retirement Benefits Authority at least once in every three months from the date of commencement of the financial year of the Scheme—
 - (i) the valuation of the scheme fund representing all the assets of the scheme, and separately the investment return thereof of contributions made by or on behalf of members of the scheme who are employees of each employer;
 - (ii) a report containing a review of the investment activity and performance of the investment portfolios comprising the scheme fund from the date of the last report containing the manager's proposals for investment of the scheme fund; and
 - (iii) a record of all investment transactions of the scheme during the previous period;

- (p) issue instructions as per the service level agreement with the custodian, manager and administrator.

(2) The Board shall within six months of commencement of these Regulations ensure that all members of the Scheme under section 5 of the Act fill and submit the Membership Enrolment Form and Beneficiary Nomination Form set out in the Schedule required under regulation 3(1)(c), for trustees' records.

PART III – GENERAL MEETINGS

6.(1) The Board shall hold an Annual General Meeting of members once in every year. Annual General Meeting.

(2) The agenda of the Annual General Meeting shall include —

- (a) a report on changes to the structure of contributions and benefits;
- (b) a report of audited accounts;
- (c) a report on investments;
- (d) a declaration of net investment return of the scheme;
- (e) a report on the remuneration of trustees; and
- (f) questions from members.

(3) The Board shall at least fourteen days before the Annual General Meeting provide to the members —

- (a) a notice of the meeting including the agenda;
- (b) minutes of the last Annual General Meeting;
- (c) the audited accounts; and
- (d) any other documents that shall be necessary for the meeting.

(4) The Board may hold the Annual General Meeting at a venue in any county within the Republic of Kenya.

(5) The Board shall publicize the notice provided under subregulation (3)(a) in such media as may facilitate widest reach to the members.

7. (1) The Board may at any time at its own discretion convene a Special General Meeting of the Scheme. Special General Meeting.

(2) At least five percent of members of the Scheme or an employer may at any time requisition a Special General Meeting of the Scheme by a written notice signed by the persons requisitioning for the meeting, specifying the object of the proposed meeting and sent by post, or delivered, to the Secretary of the trustees.

(3) The Board shall, upon receipt of the notice referred to in subregulation (2), convene a Special General Meeting of the Scheme which shall be held within thirty days after the delivery of such notice.

(4) Upon receipt of the requisition of a Special General Meeting referred to in subregulation (2), the Board shall issue a notice of the Special General Meeting within fourteen days.

(5) If the Board fails to within thirty days after the delivery of the written notice mentioned in subregulation (2) to convene a Special General Meeting of the Scheme in accordance with the requisition, the requisitioning members or employer may themselves convene such meeting to be held at any time within two months after such delivery.

(6) The resolutions of the Special General Meeting shall be conveyed to the Board in writing and implemented by the Board where applicable.

PART IV – CONTRIBUTIONS, SAVINGS AND PAYMENTS

8.(1) A member may elect to pay additional voluntary contributions to the Scheme in addition to the mandatory contributions under section 6 of the Act.

Additional
Voluntary
Contributions

(2) A member who elects to make additional voluntary contributions shall instruct the employer to deduct the additional voluntary contributions from the member's monthly pensionable emoluments and notify the scheme in Form PSSS 3 set out in the Schedule.

(3) A member shall instruct the employer and notify the scheme of his intention to increase, reduce or stop making additional voluntary contributions in Form PSSS 3 set out in the Schedule.

9.(1) Pursuant to section 24(1) of the Act, the Board shall ensure that the Administrator sets up and maintains for each member a retirement savings account in the member's name.

Retirement
Savings Account.

(2) The retirement savings account of each member of the Scheme shall show an up-to-date full breakdown of all contributions, transferred retirement savings, if any, and accrued interest.

(3) Each member shall, within four months of the end of every financial year, receive from the Scheme an annual benefit statement which will reflect all contributions, transferred retirement savings, if any, and accrued interest.

(4) Notwithstanding the provisions of subregulation (3), a member may, upon request, in writing, obtain a certified statement of their retirement savings account within seven days of the request.

(5) Where the Board has provided the information herein required online, a member may access the information at any time.

(6) The Board shall ensure that the information provided on the online platform is up to date and accessible at any time.

(7) Where the information required by a member cannot be obtained from the online platform maintained for that purpose, the Board may on the request of the member avail that information through any other appropriate means.

10.(1) Pursuant to section 26 of the Act, a member who leaves employment of the public service as defined under the Act before attaining the retirement age and who wishes to withdraw part of the retirement savings shall make a claim to the scheme in Form PSSS 4 set out in the Schedule.

Withdrawal from
the Retirement
Savings Account.

(2) A request under subregulation (1) shall be accompanied by —

- (a) copy of the member's National Identification Card; and
- (b) proof of exit from the employment of the public service as defined under the Act.

(3) Upon receipt of a request under subregulation (1), the scheme shall ensure that the member is paid within thirty days from the date of notice.

(4) The balance of the retirement savings not withdrawn by a member shall be retained until the member attains the retirement age.

11.(1) A member who leaves employment of the public service as defined under the Act before attaining retirement age and who wishes to transfer their retirement savings to another retirement benefits scheme, registered under the Retirement Benefits Act, shall request the scheme to transfer their retirement savings to the new scheme in Form PSSS 4 set out in the Schedule.

Transfer of
benefits.

Cap. 197

(2) A request under sub regulation (1) shall be accompanied by —

- (a) a copy of the member's National Identification Card;
- (b) proof of exit from employment of the public service as defined under the Act;
- (c) name and address of the new scheme; and
- (d) letter of confirmation of admission into the new scheme.

(3) Upon receipt of a request under subregulation (1), the Scheme shall ensure that the savings and accrued interest in full together with the aggregate of any additional contributions are transferred to the new scheme within sixty days from the date of a member's request.

12.(1) A member who leaves employment of the public service as defined under the Act before attaining retirement age may defer access to their retirement savings upon giving notice to the Scheme in Form PSSS 4 set out in the Schedule.

Deferment of
Benefits.

(2) A member who defers access to their retirement savings may at any time withdraw their contributions or transfer the benefits in accordance with regulation 10 and 11, respectively.

(3) Upon attainment of retirement age, a member who had deferred access to their retirement savings may notify the Scheme in Form PSSS 4

set out in the Schedule of their intention to access their retirement benefits in accordance with regulation 10.

13.(1) An employer shall notify the Scheme of a member's retirement at least twelve months before attainment of retirement age.

Retirement upon
attainment of
mandatory
retirement age.

(2) The scheme shall, not less than thirty days before a member attains the retirement age, in accordance with section 27(1)(a) of the Act, inform a member of the retirement benefit options available to the member.

(3) Upon retirement, an employer shall notify the scheme and provide the following documents to facilitate processing of the member's retirement benefits —

- (a) a copy of the member's National Identification Card;
- (b) proof of retirement from the service;
- (c) duly filled claim Form PSSS 4 set out in the Schedule; and
- (d) option election form for members who joined the Scheme at age forty-five years and above as at 1st January 2021.

(4) Upon receipt of the documents referred to in subregulation (3), the Scheme shall process and pay the benefits within thirty days.

14.(1) An employer shall inform the scheme, in writing, of the retirement of a member who retires other than under section 27(1)(a) of the Act.

Early retirement.

(2) Within fourteen days of receipt of the notice specified in sub regulation (1), the Scheme shall inform a member of the retirement benefit options available to the member.

(3) Upon retirement as specified in sub regulation (1), the employer shall provide the following documents to facilitate processing of the member's retirement benefits —

- (a) a copy of the member's National Identification Card;
- (b) proof of retirement from the service;
- (c) duly filled claim Form PSSS 4 set out in the Schedule; and
- (d) option election form for members who joined the Scheme at age forty-five years and above as at 1st January, 2021.

(4) Upon receipt of the documents referred to in paragraph (3), the Scheme shall process and pay the benefits within thirty days.

15.(1) Upon retirement, a member may on request be paid a one-off lumpsum of up to one-third of the retirement savings and the balance shall be utilized as follows —

Payment of Retirement Benefits.

- (a) for the payment of monthly or quarterly withdrawal from an income drawdown arrangement administered by the Scheme;
- (b) for the payment of monthly or quarterly withdrawal from an income drawdown arrangement of a member's choice;
- (c) for the purchase of an annuity for life from a life insurance provider of a member's choice; or
- (d) for a combination of the options in (a), (b) and (c) as guided by the member.

(2) Where the balance of the retirement savings after the determination of the lumpsum referred to in subregulation (1) results in an amount determined by the Retirement Benefits Authority as a trivial pension, the member may opt to receive the full retirement savings as a lumpsum payment.

(3) Upon retirement, a member may apply to withdraw any additional voluntary contributions into the Scheme and accrued interest in full.

16.(1) Where a member dies in service, the member's beneficiaries shall be entitled to—

Benefits from the Scheme upon death in service.

- (a) the member's retirement savings; and
- (b) the insurance benefit from the life insurance policy maintained under section 6(4) of the Act.

(2) Where a member dies in service, the employer shall notify the Board of the death of the member writing.

(3) The notification shall be accompanied by—

- (a) a duly filled claim Form PSSS 5 set out in the Schedule;
- (b) a duly filled Beneficiary Nomination Form PSSS 2 where available;
- (c) certified copy of the Death Certificate of the deceased member;
- (d) certified copy of the Marriage Certificate or Affidavit of marriage, where applicable;
- (e) certified copies of the Birth Certificates of the deceased member's children;
- (f) certified copies of the National Identification Cards of the beneficiaries, where applicable; and
- (g) clear coloured copy of the front-side of a bank ATM Card for each of the beneficiaries;

(4) The Board may require the employer or a claimant to provide such other information as may be necessary to facilitate the determination of a claim.

(5) On the death of a member, the Board shall pay the retirement savings of the deceased member as provided in the Member Nomination Form or as determined by the Board at its discretion to the beneficiaries.

(6) A beneficiary may request the Board to pay the retirement savings under regulation 16(1)(a) as follows—

- (a) a refund of one hundred percent of the retirement savings to beneficiaries in lumpsum;
- (b) a refund of up to one-third of the total retirement savings as lumpsum and the remaining two-thirds to be utilized to purchase an annuity;
- (c) a refund of up to one-third of the total retirement savings as lumpsum and the remaining two-thirds be paid out in form of an Income Drawdown arrangement administered by the Scheme;

- (d) a refund of up to one-third of the total retirement savings as lumpsum and the remaining two-thirds be paid out in form of regular income from an Income Drawdown Fund of the beneficiary's choice
- (e) utilize one hundred percent of the total retirement savings to purchase an annuity;
- (f) utilize one hundred percent of total retirement savings to receive a regular income from an Income Drawdown Fund of the member's choice;
- (g) utilize one hundred percent of total retirement savings to receive a regular income from the Scheme;
- (h) transfer the total retirement savings to a trust fund for management of upkeep and education expenses for minor beneficiaries; or
- (i) payment of up to one third of the retirement savings in lumpsum and transfer of the balance to a trust fund for management of upkeep and education expenses for minor beneficiaries.

(7) The Board shall have discretion on the distribution of the benefits referred to in subregulation (1) while taking into consideration the wishes of the deceased member as provided in the beneficiary nomination form, if any.

(8) The reasons for the exercise of the discretion and the decision of the Board shall be recorded in the minutes of the meeting of the Board and disclosed to the beneficiaries.

17.(1) Upon receipt of a notification under regulation 16(2), the Board shall notify the provider of the life insurance policy maintained under section 6(4) of the Act of the death in writing and require the insurance provider to settle the claim.

Benefits under
Life Insurance.

(2) Upon receipt of the proceeds of the life insurance benefit, the Board shall determine the application of the benefits in accordance with subregulation (3).

(3) the Board may pay the death benefits under section 6(4) of the Act as follows—

- (a) directly to the nominated beneficiaries; or
- (b) to such other person as the Board may determine in the exercise of its discretionary powers.

(4) Where the beneficiaries are children below the age of eighteen years, the Board shall exercise its discretion to determine that the retirement savings and the life insurance benefits referred to in section 6(4) of the Act are retained and administered by the Board or are transferred to a trust fund determined by the Board.

(5) The retirement savings and life insurance benefits referred to in sub-regulation (4) shall be utilized for the education, healthcare and

upkeep of the children until the children attain the age of twenty-five years or complete their education, whichever is earlier.

18.(1) The Cabinet Secretary shall—

Retirement
Benefits accrued
before the
commencement of
the Act.

- (a) for the purposes of recognizing the retirement benefits of a member under section 50(1)(b) of the Act, determine the value of benefits relating to service under other pension schemes existing before the commencement of the Act through an actuarial valuation of the benefits entitled to each member as at the date of joining the Scheme;
- (b) revalue the benefits determined under paragraph (a) at a rate of five per cent per year up to the date of member's exit from the Scheme;
- (c) communicate the benefits under paragraph (a) and the revaluation rate under paragraph (b) to the members of the Scheme through issuance of recognition letters in accordance with section 50(1)(b) of the Act;
- (d) copy the recognition letters to the employer;
- (e) on or before the exit of a member from the Scheme, charge the benefits determined under paragraphs (a) and (b) on the Consolidated Fund; and
- (f) ensure that the member is paid in accordance with the Pensions Act.

PART V – MISCELLANEOUS

19.(1) Any dispute arising from the decision of the manager, administrator or custodian arising from the application of the Act and these Regulations, shall be resolved by the Board in the first instance.

Dispute
Resolution.

(2) where a member is dissatisfied with a decision of the Board, the member may seek a review to the Chief Executive Officer of the Retirement Benefits Authority in accordance with section 46 of the Retirement Benefits Act.

Cap. 197

(3) where a member is dissatisfied with the decision of the Chief Executive Officer of the Retirement Benefits Authority, the member may appeal to the Retirement Benefits Appeals Tribunal in accordance with section 48 of the Retirement Benefits Act.

SCHEDULE

PSSS. 1

(r. 3(1)(c)(i))

MEMBER ENROLMENT FORM

PART A: PARTICULARS OF CONTRIBUTOR/MEMBER

Name of Employer:

Full name of Member:

Personal/Employment No: Date of Employment:

Date of birth: ID/Passport No:

KRA PIN:

Mobile No: Email Address:

Postal Address.....Code.....Town

SECTION B: DECLARATION

I certify that the above information is true and correct in every respect to the best of my knowledge. I agree to be bound by the Public Service Superannuation Scheme Act, related laws and regulations

Name:

Signature:Date:

APPLICANT NOTE: Please attach copy of National ID/Passport

SECTION C: EMPLOYER CONFIRMATION

The information provided herein is correct and accurate in accordance with our records.

Signature of Authorized Official: Date:

Designation: Official Stamp:

SECTION E: FOR OFFICIAL USE ONLY

Received by (Name):	Verified by (Name):
Copy of ID/Passport Attached	
Date Received:	

(r. 3(1)(c)(ii), 16(3)(b))

PART A: PARTICULARS OF CONTRIBUTOR/MEMBER

Postal Address Code..... Town

I hereby request the Board to pay any benefits in my name which shall become due under the Public Service Superannuation Scheme Act to the beneficiaries detailed in the proportion(s) indicated against the name of each beneficiary. (Include Guardian in the event that the children are less than 18 years of age).

[illegible]

**PART C: GUARDIANSHIP OF CHILDREN BELOW 18 YEARS IN CASE
MEMBERS LEAVE NO SURVIVING SPOUSE**

In the event that any of the above-named Nominated Beneficiaries is a minor at the time that any benefit becomes payable upon the event of my death, I elect that the Board of Trustees of the Scheme:

Pay the benefit due to such minor to such minor's trust as the Board may cause to be established or otherwise determine, upon trust to be used for the maintenance and/or educational expenses of such minor beneficiary. In this connection I confirm that I am aware and agree that all sums representing such benefit shall be invested by the trustees of such minor's trust and the income deriving therefrom shall be added to the residue from time to time of the principal sum and the aggregate thereof shall be applied first to pay the charges of such trustees and thereafter applied to the aforementioned maintenance and/or educational purposes.

OR

Pay the benefit due to such minor Nominated Beneficiary(ies) to the Guardian named on the understanding that such Guardian will assume responsibility for applying the benefit for the maintenance and/or education of such Nominated Beneficiary(ies), as to which the Board of Trustees shall be under no obligation to verify or take any steps to ensure:

Name of Guardian Relationship

I/D No..... Mobile No.

Address:.....Code.....Town

Signature:Date:

Witnessed by I/D No..... Mobile No.

N/B: The witness should not be a Trustee, Officer of the Scheme or Beneficiary

APPLICANT NOTE: Please attach copy of National ID/Passport

SECTION C: DECLARATION

I, the undersigned, recognize that my circumstances and those of the persons shown above as beneficiaries may change. I undertake to advise the trustees when any change should be made regarding my nominated beneficiaries. I understand that:

This form amounts to an expression of my wishes, and it is not binding on the trustees.

This nomination cancels and replaces any previous nominations completed and submitted to the trustees and will form the basis of the allocation of my benefits in the event of my death.

I certify that the above information is true and correct in every respect to the best of my knowledge. I agree to be bound by the Public Service Superannuation Scheme Act, related laws and regulations.

Name:

Signature:Date:

APPLICANT NOTE: Please attach copy of National ID/Passport

SECTION D: FOR OFFICIAL USE ONLY

Received by (Name):	Verified by (Name):
Copy of ID/Passport Attached	
Date Received:	

PSSS. 3

(r. 8(2), (3))

**ADDITIONAL VOLUNTARY CONTRIBUTIONS
APPLICATION FORM**

<p>Complete CAPITAL LETTERS</p> <p>(Please read Section 3 before you complete, sign and date your form)</p> <p>To: (Employer)</p> <p>.....</p>
<p>SECTION 1: MEMBER DETAILS</p> <p>Member Personal Number: Full Name:</p> <p>Date Joined Scheme:..... AVC Commencement Date:</p>
<p>SECTION 2: CONTRIBUTIONS</p> <p>(You may choose to commence, vary or cancel additional voluntary contributions through payroll deductions). Please choose one option below.</p> <p>(i) New Contribution</p> <p>I wish to commence contributing Kshs.towards Additional Voluntary Contributions (AVCs) with effect from</p> <p>(ii) Variation of Contribution</p> <p>I wish to vary my contributions from Kshs. to Kshs.....</p> <p>towards additional voluntary contributions (AVCs) with effect from</p> <p>(iii) Canceling Contributions</p>
<p>SECTION 3: DECLARATION</p> <p>(Please read this declaration before you sign and date your form)</p> <p>I declare that the information provided is complete and correct</p> <p>I understand that my regular voluntary contributions must be preserved until I believe eligible to receive benefits under the Scheme</p> <p>I understand that I will be bound by the provisions of the Act</p> <p>Signature:Date:</p>

OFFICIAL USE ONLY

(To be completed by Head-
Human Resource)

I confirm that the Additional Voluntary contributions have been effected from the
month of.....

Name of OfficerSignature

Date & Stamp

PSSS. 4

(r. 10(1), 11(1), 12(1), (3), 13(3)(c), 14(3)(c))

BENEFITS CLAIM FORM

PART I: STATEMENT OF PARTICULARS

Name of Employer:

Full Name of Member:.....Personal/Employment No:

ID/Passport No: KRA PIN

Bank details: Account No. Bank Branch:

Mobile No: Email Address

Postal Address Code Town

Date of Birth (DD/MM/YY):

Date of leaving employment:

Reason for leaving employment:

PART II: EMPLOYER CONFIRMATION

The information provided herein is correct and accurate in accordance with our records.

Signature of Authorized Official: Date:

Designation:

Official Stamp:

*DOCUMENTS REQUIRED WITH CLAIM FORM

1. The following documents MUST be attached to the claim form
2. Letter of confirmation of exit from service
3. Certified Copy of National ID
4. Clear copy of front-page ATM Card,
5. KRA PIN certificate
6. For emigration benefits: Proof of permanent residency in another country
7. Option election form for members who joined PSSS at age 45 years and above as at the 1st January, 2021.

PART III: OPTIONS AVAILABLE ON NORMAL RETIREMENT, EARLY
RETIREMENT OR RETIREMENT UNDER 12/16/20 YEAR RULE (Tick one option)

Payment of up to 1/3 of total benefits payable as lumpsum and the balance
to purchase an annuity.

☐

Payment of up to 1/3 of the total benefits payable as lumpsum and the balance
to purchase a regular income from an Income Drawdown Fund

☐

Utilize 100% of total benefits payable to purchase an annuity.

☐

Utilize 100% of total benefits payable to receive a regular income from an
Income Drawdown Fund.

☐

Payment of 100% of the total benefits payable if the commuted pension
is below trivial pension.

☐

NB: If you opt to transfer to another registered scheme, please provide the following information.

Name of the scheme

Administrator

Bank account details of the receiving scheme:

Account Name:

Account no.

Bank: Branch

PART IV: DECLARATION

I understand that the Trustees have the final discretion on the settlement of benefits from the fund and will be guided by the provisions of the applicable laws.

I also confirm that the Bank Account and/or the M-Pesa Phone Number details I have provided above are correct and discharge the trustees of any liability that may arise out of using the indicated information for the settlement of my benefit.

I certify that the above information is true and correct in every respect to the best of my knowledge. I agree to be bound by the Public Service Superannuation Scheme Act and Regulations.

Name:

Signature: Date:

PSSS. 5

(r. 16(3)(a))

DEATH BENEFITS CLAIM FORM

PART1: PARTICULARS OF DECEASED MEMBER

Full Name of Member:

Personal/Employment No:

Name of Employer:

Date of Birth (DD/MM/YY): Date of Death:

PART 2: PARTICULARS OF CLAIMANTS

	Name	Relationship to Deceased	National ID/ Birth Certificate Entry No.	KRA PIN (Where applicable)	Mobile Number

Claimants' (or first claimants) current home particulars

- County..... Subcounty.....
- Location..... Sublocation.....
- Village Chief's name.....

PART 3: OPTIONS AVAILABLE TO THE BENEFICIARIES (Tick one option)

1. Refund of 1/3 of total benefits payable as lumpsum and the remaining 2/3 to be utilized to purchase an annuity. ☐
2. Refund of 1/3 of total benefits payable as lumpsum and the remaining 2/3 be paid out in the form of regular income from an income drawdown Fund. ☐

3. Utilize 100% of total benefits payable to purchase an annuity. ☐
4. Utilize 100% of total benefits payable to receive a regular income from an income drawdown Fund ☐
5. Transfer the benefits to a trust fund for minor beneficiaries ☐
6. Refund of 100% of accumulated credit to beneficiary(ies) as lumpsum ☐

N/B: The options are subject to the discretion of the Trustees.

Mobile Phone Number (s):

** Please note that the M-Pesa payment option is applicable for benefits less than KES 500,000*

PART 6: DECLARATION

- I. I (we) understand that the Board of Trustees of the Scheme has the final discretion on the settlement of benefits from the Scheme and will be guided by the provisions of the applicable laws.
- II. I (we) also confirm that the Bank Account and/or the M-Pesa Phone Number details I have provided above are correct and discharge the Trustees of any liability that may arise out of using the indicated information for settlement of my benefits.
- III. I (we) understand that the Scheme shall not be held responsible for any non-receipt of payment on account of wrong/incorrect/incomplete information given by me in this form. If a transaction is delayed or is not completed due to incomplete or incorrect information, I shall not hold the Scheme responsible.

1st Claimant's Signature: Date:

2nd Claimant's Signature: Date:

IF MORE THAN TWO CLAIMANTS AFFIX YOUR SIGNATURE ALONG THE RIGHT MARGIN

Signed in the presence of: Full name of witness ID No:

Signature: Date:

Declaration

I confirm that the information is correct to the best of my knowledge

Name: Signature:

Designation Date:

Official stamp

* LIST OF DOCUMENTATION

1. A certified copy of the Death Certificate of the deceased member
2. A certified copy of marriage Certificate or Affidavit of marriage (where applicable)

3. A certified copy of the Birth Certificate of the deceased member's children.
4. Certified Copies of claimants' National Identity Cards
5. Clear copy of the front-page ATM/bank Card for each beneficiary
6. The form must be witnessed.

JOHN MBADI NG'ONGO,
*Cabinet Secretary for
the National Treasury and Economic Planning.*