

APPLICATION FOR ACCREDITATION
as Personal Equity and Retirement
Account (PERA) Administrator

BIR Form No.

1941

July 2016



Republic of the Philippines
Department of Finance
Bureau of Internal Revenue

Enter all required information in CAPITAL LETTERS using in black ink. Mark all applicable boxes with an "X". Three (3) copies must be filed with the BIR.

1 Type of Application ☐ New ☐ For Renewal	2 Application Number (To be filled-up by BIR) 	3 Date of Application (To be filled-up by BIR)
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Part I - PERA Administrator's Information

4 Taxpayer Identification Number (TIN) 	5 RDO Code
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6 Applicant's/Entity's Registered Name

7 Authorized Representative (Last Name, First Name, Middle Name)

8 Registered Address (indicate complete registered address)

9 Contact Number of Entity 	10 Contact Number of Representative 	11 Municipality Code (To be filled-up by BIR)
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12 Email Address

13 Declaration I declare, under the penalties of perjury, that this application has been made in good faith, verified by me, and to the best of my knowledge and belief, is true and correct, pursuant to the provisions of the National Internal Revenue Code, as amended, and the regulations issued under authority thereof. Applicant/Authorized Representative (Signature over Printed Name)	 Position	 Date	Stamp of Receiving Office and Date of Receipt (RO's Signature over Printed Name)
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Part II - Details of Qualification Certificate

14 Qualification Certificate Number 	14A Validity Period From To
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15 Issuing Regulatory Authority ☐ Bangko Sentral ng Pilipinas (BSP) ☐ Securities and Exchange Commission (SEC) ☐ Office of the Insurance Commission (OIC)

Part III - Evaluation (To be filled-up by concerned Revenue Officer of the BIR)

16 Evaluation Result ☐ All required attachments are complete ☐ Incomplete required attachment/s 	☐ All the information above are verified from the ITS/eTIS ☐ Other findings (specify)
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17 Recommended for: ☐ Approval ☐ Disapproval	By: Signature over Printed Name of Processing Officer
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Part IV - Final Decision (To be filled-up by the Head of the Processing Office Only)

18 This application for accreditation is hereby: ☐ Approved ☐ Disapproved	18A Reason for Disapproval 	 Chief-Audit Information, Tax Exemption and Incentives Division (Signature over Printed Name)	 Date
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Required Attachments:

1. Qualification Certificate issued by the concerned Regulatory Authority.
2. Tax Clearance for PERA Administrator (BIR Form No. 2342) issued by the Regional Director/Assistant Commissioner of Large Taxpayer Service (LTS) that the PERA Administrator is a regular filer and has no final and executory liability.
3. Proof of payment of P500.00 Accreditation Fee with BIR Form No. 0605.

NOTE: This application shall be filed in three (3) copies (2 copies for BIR and 1 copy for the applicant) to the PERA Processing Office Audit Information, Tax Exemption and Incentives Division (AITEID) of the Bureau of Internal Revenue.