

NEW MEMBER APPLICATION

UMBRELLA FUND / FUND NAME _____

PARTICIPATING EMPLOYER _____

MEMBER DETAILS

SURNAME _____ FIRST NAMES _____

DATE OF BIRTH _____ IDENTITY NUMBER _____

GENDER: MALE FEMALE MARITAL STATUS _____

RESIDENTIAL ADDRESS _____

POSTAL ADDRESS _____

(Both of the above addresses are required by the SA Revenue Services - SARS)

TEL NO. (_____) _____ CELL PHONE NO. _____

E-MAIL ADDRESS _____

PREFERRED LANGUAGE FOR CORRESPONDENCE: ENGLISH AFRIKAANS

INCOME TAX REFERENCE NO. _____ REVENUE OFFICE OF LAST TAX RETURN _____

SPOUSE'S DETAILS (if applicable)

SURNAME _____ FIRST NAMES _____

DATE OF BIRTH _____ IDENTITY NUMBER _____

DATE OF MARRIAGE _____ COMMUNITY OF PROPERTY? YES NO

EMPLOYMENT DETAILS

EMPLOYEE NO. _____ EMPLOYER _____

BRANCH _____ COST CENTRE _____

DATE OF JOINING SERVICE _____ DATE OF JOINING FUND _____

ANNUAL PENSIONABLE SALARY _____ OCCUPATION _____

TRANSFER DETAILS

DO YOU WISH TO TRANSFER ANY MONEY FROM YOUR PREVIOUS FUND? YES NO

If 'YES', please provide the following information:

NAME OF PREVIOUS EMPLOYER: _____ EMPLOYEE NO.: _____

NAME OF PREVIOUS FUND: _____ MEMBER NO.: _____

DATE OF TERMINATION FROM PREVIOUS FUND: _____ TYPE OF FUND: _____

HAVE YOU RECEIVED ANY BENEFIT FROM THE PREVIOUS FUND: YES NO

IF 'YES', PLEASE PROVIDE DETAILS: _____

*The transferee (receiving) fund is reliant on the receipt of transfer documentation and proof of payment. It is therefore the responsibility of the member to ensure that the transferor (previous) fund is timeously informed of the decision to transfer the benefit.

DECLARATION

I hereby confirm that the above details are correct and that I will make no claim against the Fund in the event of any loss, damage or claim from the use of this information, or in the event that incorrect information has been supplied by me.

SIGNATURE OF EMPLOYEE _____ DATE _____

SIGNATURE OF EMPLOYER _____ DATE _____

EMPLOYER STAMP

SUPPORTING DOCUMENTS REQUIRED

- Proof of employee's identity

NOTES

- The information disclosed within this document will be treated as confidential and will only be used for the purpose for which it is intended in terms of applicable legislation.
- Where there is risk cover, the employee must be in active service on the date of joining the Fund.