

## BENEFIT CLAIM FORM: PAID-UP MEMBER

UMBRELLA FUND / FUND NAME \_\_\_\_\_

PARTICIPATING EMPLOYER \_\_\_\_\_

### MEMBER DETAILS

MEMBER NO. \_\_\_\_\_ EMPLOYEE NO. \_\_\_\_\_

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 \_\_\_\_\_

### BANKING DETAILS

*(Please attach a copy of your bank statement)*

ACCOUNT HOLDER'S NAME \_\_\_\_\_

BANK NAME \_\_\_\_\_ ACCOUNT NUMBER \_\_\_\_\_

BRANCH NAME \_\_\_\_\_ BRANCH CODE \_\_\_\_\_

ACCOUNT TYPE:  CURRENT  SAVINGS  TRANSMISSION

FOREIGN ACCOUNT  (Tick if applicable) COUNTRY \_\_\_\_\_

### DIVORCE ORDERS

Are you aware of any Divorce Order issued by the High Court / Supreme Court against your pension benefit in favour of an ex-spouse?

YES  NO

If yes, attach an original certified copy of the complete divorce court order to this form (if not already supplied to the Fund). This order must be in terms of Section 7(8) of the Divorce Amendment Act 1989, to be binding on the Fund. Please provide full contact details of the ex-spouse in order for the benefit payment to be made by the Fund.



## **SUPPORTING DOCUMENTS REQUIRED**

WITHDRAWAL: Bank Statement

RETIREMENT: Proof of identity  
Bank Statement

DEATH: Original certified copies of the following documents:

- Death Certificate (BI-5 or BI-20)
- Member and Spouse's Identity document
- Marriage Certificate
- Identity documents of any other dependants
- Beneficiary Nomination Form

Disposal of Death Benefits Form

Banking Details and Addresses of Dependants/Beneficiaries

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## **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.
- Payment will only be made on receipt of a tax directive, issued by the SA Revenue Service (SARS).