

# DEPENDANTS AND NOMINEES FORM

<input type="checkbox"/> <b>HEAD OFFICE</b> P O Box 32528 Braamfontein, 2017 76 Juta Street Braamfontein, 2001 Tel: (010) 206-0000 Fax: (086) 688-5566 CCNPF: (010) 206 0900	<input type="checkbox"/> <b>DURBAN</b> P O Box 2183 Durban, 4000 4th Floor, Station Building Tourist Junction 160 Monty Naicker Road Durban, 4001 Tel: (031) 366-7700 Fax: 086 680 6160	<input type="checkbox"/> <b>PORT ELIZABETH</b> P O Box 27135, Greenacres Port Elizabeth, 6057 70-2nd Avenue, Newton Park Port Elizabeth, 6045 Tel: (041) 391-5200 Fax: (041) 391-5230	<input type="checkbox"/> <b>CAPE TOWN</b> P O Box 1680 Cape Town, 8000 12th Floor 1 Thibault Square Thibault Square Cape Town, 8001 Tel: (021) 403-9200 Fax: (021) 421-3599	<input type="checkbox"/> <b>RUSTENBURG</b> 171 Beyers Naude St. Old Mutual Building Rustenburg, 0300 Tel: (014) 592 2391 (014) 592 2672 Fax: 086 206 5296 086 206 5176	<input type="checkbox"/> <b>POLOKWANE</b> P O Box 1924 Polokwane, 0700 20 Church Street Polokwane 0699 Tel: (015) 291 4184 (015) 295 6920 Fax: (015) 291 5006	<input type="checkbox"/> <b>PRETORIA</b> P O Box 19229 Pretoria West, 0117 Jet Set Park, Shop 7 Cnr Kgosi Mampuru & Johannes Ramokhoase Pretoria, 0001 Tel: (012) 323-6363 Fax: 086 679 5409	<input type="checkbox"/> <b>BLOEMFONTEIN</b> 34 Joe Building Elizabeth Street Bloemfontein 9323 Tel: (051) 430 0077 Fax: 086 644 3135	<input type="checkbox"/> <b>KROONSTAD</b> 38 President Street Kroonstad 9499 Tel: (056) 212 1005 Fax: 086 673 9443
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Leader in People Benefits in Africa

TO THE TRUSTEES OF

FULL NAME OF FUND IN BLOCK CAPITALS

NAME OF MEMBER (BLOCK CAPITALS): ..... EMPLOYEE NUMBER/ID or PASSPORT NUMBER .....

NAME OF EMPLOYER: ..... BRANCH / SITE / PLANT NAME: .....

1. In terms of section 37C of the Pension Funds Act ("The Act") the Board of Trustees (The Trustees) have the responsibility to distribute the death benefit that becomes payable in terms of the Rules of the Fund. Section 37C of the Act requires the Trustees to distribute the death benefit amongst the beneficiaries of the member in a manner and proportions that the Trustees deem equitable. Although the Trustees make the final decision as to how the death benefit should be distributed, your recommendation will be an important guide to the Trustees in paying the benefit in the event of your death.

2. DEPENDANT: (a person in respect of whom the member is legally liable for maintenance or a person in respect of whom the member is not legally liable for maintenance but who is financially dependent on the member (e.g. spouse, children and parents))

Surname	First Names	Gender F/M	Identity Number / Passport Number	Percentage of Benefit	Relationship	Contact Tel. No.	Physical Address

3. NOMINEE: (a person who is not dependant of the member but has been nominated by the member, in writing, to receive a benefit upon the member's death.)

Surname	First Names	Gender F/M	Identity Number / Passport Number	Percentage of Benefit	Relationship	Contact Tel. No.	Physical Address

# DEPENDANTS AND NOMINEES FORM



## 4. Undertaking:

- The Fund will comply at all times with the Protection of Personal Information Act, No 4 of 2013 ("POPI").
- The Administrator may be required to collect and share your personal information as well as personal information of your dependants and or nominees, which you have provided to the fund, in investigating and distributing the death benefit.
- In instances where the Fund is unable to contact your dependants and or nominees, the Fund may appoint external tracing agents and give them access to your dependants and nominees' personal information in order to do any tracing. If a tracing agent is appointed, a tracing and management fee may be deducted from the benefits payable.
- You authorise the Fund's representatives and contracted third party service providers to collect and process certain personal information from your employer or any third party in order to assist the Trustees in making a decision with regard to the distribution of the death benefit.

## 5. I hereby acknowledge;

- That this nomination cancels all nominations, if any, that I have made in respect to my membership of the fund;
- That the nomination form is not a final Will and Testament but will serve as a guide to the Trustees in distributing the death benefit in terms of section 37C of the Act;
- I recognise that my circumstances and those of the persons recorded above as dependants and/ or nominees may change;
- I accept that it is my responsibility to advise my employer should my circumstances change (e.g. child is born, get married or divorced)
- It is my responsibility to ensure that my employer has up to date contact information for my dependants and/ or nominees

SIGNED: \_\_\_\_\_ DATE \_\_\_\_\_

## 6. DISPOSAL OF LUMP SUM DEATH BENEFITS (THIS EXPLANATION IS NOT A LEGAL DOCUMENT- THE WORDING OF THE ACT IS DEFINITIVE)

In terms of the Pension Fund Act, a member's dependants and persons who are not dependants but who are nominated by the member must be taken into cognisance by the Trustees when they decide on how the lump sum benefits are to be distributed upon the death of a member belonging to the registered pension or provident fund.

(Disclaimer: This Nomination Form only applies to (lump sum death benefits payable in terms of the Rules of the Fund. Death benefits are awarded and paid in terms of Section 37C of the Pension Fund Act to dependants, nominees or your Estate.)

## 7. PLEASE LIST YOUR DEPENDENTS AND ANY NOMINEES ON THE OTHER SIDE OF THIS FORM AFTER YOU HAVE READ THE FOLLOWING NOTES:

Briefly, the position is as follows;

- If there are dependants and no nominees, payment of the benefit due must be made to one, some or all those dependants in such proportions as the Trustees shall determine
- If there are dependants and the member has indicated nominees on this form to receive part or all of the benefit, the Trustees shall determine the proportion which is to be paid to each dependant and the proportion to be paid to each nominee (a nil proportion may be allocated)
- Only if there are no dependants, and then only to the extent that payment is not due to a nominee, shall any balance remaining be paid to the deceased member's estate or, where appropriate, the guardian's fund
- Trustees have the right to transfer monies to trust or Beneficiary funds, for the benefit of a minor dependant or minor nominee or the guardian
- If there are both dependants and nominated beneficiaries, such nomination must have been made on or after 30 June 1989. Nominations made prior to this date are not valid

## 8. NOTES:

- Any income tax payable will be deducted prior to any payment, as applicable
- The fact that a person is classified as a dependant or nominee does not mean that the Trustees must award him or her any benefit from the fund
- An institution (e.g. an old age home) can be chosen as a nominee
- The requirements set out above do not apply to pensions payable to spouses or dependants in terms of specific provisions of the rules, such pensions are payable as described in the rules
- The requirements set out above do not apply to Unapproved Group Life Assurance Fund
- Prior to 19 April 1996 major children did not automatically qualify as dependants
- Any alterations or deletions on the forms must be initialed (abbreviated signature)
- The percentage of benefits indicated must total 100%