

Benefit Claim Form

Employee Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Policy Reference Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Member personal details	Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>																																																																															
	Surname: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																															
	First Name: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																															
	Identity Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> (certified copy of ID required).																																																																															
	Passport Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																															
	Country Of Issue: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																															
	Date of Birth: <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y																																																																							
	D	D	M	M	Y	Y	Y	Y																																																																								
	Date Joined Fund: <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y																																																																							
	D	D	M	M	Y	Y	Y	Y																																																																								
	Tax Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																															
	Marital Status: Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Partner <input type="checkbox"/> Single <input type="checkbox"/>																																																																															
	Spouse Date of Birth: <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y																																																																							
	D	D	M	M	Y	Y	Y	Y																																																																								
Contact Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Private Email Address: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Unit Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Complex: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Street Number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Street Name: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Suburb / District: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
City / Town: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Postal Code: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Postal Address: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																
Postal Code: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																																																																																

Divorce Decree	Do you have any Divorce Decree/Court Orders that the Fund should be notified about?
	If Yes, complete details below Yes <input type="checkbox"/> No <input type="checkbox"/>
	In terms of the Divorce Amendment Act 7 of 1989, pension interest becomes payable to non-member spouse when the member withdraws from the Fund on resignation, retirement, retrenchment or death. The Act defines pension interest as an amount equal to withdrawal benefit which would have become payable in terms of the fund if the member had withdrawn on the date of the divorce. Therefore, please provide details of any claimants that the FUND should be notified of as well as a copy of the full divorce order, if not previously submitted.

Details of Ex spouse	Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>
	Surname: <input type="text"/>
	First Name: <input type="text"/>
	Contact Address: <input type="text"/>
	Postal Code: <input type="text"/>
	Contact Number: <input type="text"/>

Alternative contact	Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>
	Surname: <input type="text"/>
	First Name: <input type="text"/>
	Contact Number: <input type="text"/>

Exit details	Exit Date: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Exit Code: <input type="text"/> (Refer to the below for Exit Codes).
	(Date exit is the first day out of service).
	Cause of Death: <input type="text"/>

EXIT CODES

- 70 RETRENCHMENT
- 71 NORMAL RETIREMENT
- 72 DEATH
- 73 VOLUNTARY WITHDRAWAL
- 68 SECTION 14

The recovery of personal indebtedness of the employer is not permitted.

Cause of Employee's Debt:

Compensation of damages caused by an employee

Housing Loan:	<input type="checkbox"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Theft:	<input type="checkbox"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dishonesty:	<input type="checkbox"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fraud:	<input type="checkbox"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Misconduct:	<input type="checkbox"/>	Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Claims against the member's benefits are limited to the provisions of S37D of the Pension Funds Act 24 of 1956 (as amended) which are as follows:

- Amounts due to the Fund or Employer in respect of any housing loan including guarantee/s by the Fund or Employer for such a loan.
- Amounts due by a member in respect of losses suffered by the Employer through theft, dishonesty, fraud or misconduct by the member and in respect of which:
 - Member has admitted liability in writing AOD: Acknowledgement of debt of damages caused by an employer or
 - Judgment has been obtained against the member in any court of law (Section 300/ civil litigation).
- Further exceptions permitted in terms of S37A of the Pension Funds Act are in respect of:
 - Amounts due by a member in terms of a maintenance order as defined in Section 1 of the Maintenance Act,
 - Portion of the "Pension Interest" allocated to the non-member spouse in terms of the divorce decree granted under Section 7(8)(a) of the Divorce Act, 1979 (if no claim was made by the non-member spouse prior to membership termination).

Member Election

Has the member made an election

Yes

No

NOTE: if no election is made by the member, then the member will become by default a PAID UP member ONLY complete the benefit option if the answer to the above question is "YES"

Benefit Option

This Section is NOT applicable for death exit code.

Benefits are paid in terms of the rules of the specific Fund.

- 1. Full Benefit to be paid as a cash Lump Sum
- 2. Full Transfer of the benefit to an Approved Fund
- 3. Defer my benefit
- 4. Partial transfer of benefit to an approved Fund

NOTE 1: If option 1 or 4 is selected please provide banking details to facilitate payment

NOTE 2: If Option 2 or 4 is selected please ensure a Registered Insurer Transfer Form is completed for each annuity purchased

OPTIONS IN RESPECT OF PARTIAL TRANSFER OF BENEFIT TO AN APPROVED FUND (Option 4)

(Please indicate either the Rand Amount or Percentage)

Please complete only one option

<p>OPTION A</p> <p>Rand Amount</p> <p>Cash: R <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>Transfer: Balance of Fund Credit</p>	<p>OPTION B</p> <p>Percentage</p> <p>Cash: <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %</p> <p>Transfer: Balance of Fund Credit</p>
<p>OPTION C</p> <p>Rand Amount</p> <p>Transfer R <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>Cash: Balance of Fund Credit</p>	<p>OPTION D</p> <p>Percentage</p> <p>Transfer: <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %</p> <p>Cash: Balance of Fund Credit</p>

Annuities (Required for Full Transfer or Partial Transfer)

Number of annuities purchased (Max 4).

Member bank details

Name of the Account Holder:

Bank Name:

Branch Code:

Account Number:

Account Type: Cheque Savings Transmission

By law the fund may not make a benefit payment to any third party (any person other than the member).

Personal Information

I hereby give my consent to the processing of my personal data by Momentum Retirement Administrators, the Fund and or my Employer for the purpose of processing my claim.

Yes

No

Member Signature

Date:

Declaration by member

I hereby confirm that benefit counselling was made available to me by the Fund prior to making an election. Yes No

I hereby confirm that: the details provided herein are true and correct in every way; I understand the options available to me with regard to the payment of my benefits, including the tax implications and that I am making an informed choice; in the event of any loss suffered as a result of any details provided herein being incorrect, neither the Fund nor Momentum Retirement Administrators can be held liable for such losses.

Surname:

First Name:

Identity/Passport Number:

Date:

Member's Signature

Declaration by employer representative

I hereby declare that all the particulars furnished on this form are true and correct.

Surname:

First Name:

Identity/Passport Number:

Date:

Employer Contact Number:

Branch / Division Name:

Email Address:

Signed on behalf of Employer

Official Company Stamp

IN CASE OF NON-DEATH THE MEMBER AND EMPLOYER SIGNATURES MUST BE PRESENT TO ENABLE PAYMENT

NB: NO BENEFIT PAYMENT WILL BE PROCESSED BY THE ADMINISTRATOR UNLESS THIS DOCUMENT IS ACCOMPANIED BY A DULY COMPLETED ELECTRONIC BENEFIT CLAIM FORM (BCF).