

Nominate a beneficiary for your retirement fund



This form will only be accepted when submitted with a completed and signed Initial Investment Retirement Annuity Fund or Initial Investment Preservation Fund form.

Please note

- Beneficiary nominations will only be accepted on written instruction from the investor; persons acting on behalf of the investor may not nominate beneficiaries.
- In terms of Section 37C of the Pension Funds Act, 24 of 1956, the trustees of the fund have a duty to apportion the benefits between your dependants and nominated beneficiaries as they deem equitable.
- Your nominations will assist the trustees in making their decision, however, payment to your nominated beneficiary(ies), is / are not guaranteed.

FIRST BENEFICIARY

Percentage allocation % Relationship

(no decimals)

Title and surname

First names

Date of birth
D D M M Y Y Y Y

SA ID number

Passport number Nationality

(if foreign national)

Passport expiry date
D D M M Y Y Y Y

CONTACT DETAILS

Cell + (0)

Email address

Telephone + (0)

Alternate telephone + (0)

Would you like the beneficiary to be paid via a trust? Yes No

If yes, is the trust established in terms of your will? Yes No

If no, please provide the following:

Name of trust

Trust Master's reference number

Title and surname of contact person

First names

Date of birth
D D M M Y Y Y Y

Country of tax residency

SECOND BENEFICIARY

Percentage allocation % Relationship

(no decimals)

Title and surname

First names

SA ID number

Passport number (if foreign national) Nationality

Passport expiry date
D D M M Y Y Y Y

CONTACT DETAILS

Cell + (0)

Email address

Telephone + (0)

Alternate telephone + (0)

Would you like the beneficiary to be paid via a trust? Yes No

If yes, is the trust established in terms of your will? Yes No

If no, please provide the following:

Name of trust

Trust Master's reference number

Title and surname of contact person

First names

Country of tax residency

If you would like to nominate additional beneficiaries, please attach a separate list signed by the investor detailing the information required above.