

Benefit Claim Form

Employee No.:

Policy Reference No.:

Member personal details	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"/>														
	Identity No.:	<input type="text"/>					(certified copy of ID required).									
	Passport No.:	<input type="text"/>														
	Country Of Issue:	<input type="text"/>														
	Date of Birth:	D	D	M	M	Y	Y	Y	Y	Tax No.:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Date Joined Fund:	D	D	M	M	Y	Y	Y	Y							
	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:	D	D	M	M	Y	Y	Y	Y							
	Contact No.:	<input type="text"/>														
	Private Email Address:	<input type="text"/>														
	Unit No.:	<input type="text"/>														
	Complex:	<input type="text"/>														
	Street No.:	<input type="text"/>														
	Street Name:	<input type="text"/>														
	Suburb / District:	<input type="text"/>														
	City / Town:	<input type="text"/>														
	Postal Code:	<input type="text"/>														
	Postal Address:	<input type="text"/>														
Postal Code:	<input type="text"/>															

Divorce Decree

Do you have any Divorce Decree/Court Orders that the Fund should be notified about?

If Yes, complete details below **Yes** **No**

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as an amount equal to withdrawal benefit which would have become payable in terms of the fund if the member had withdrawn on the date of the divorce.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 should you divorce please provide details of any claimants that the FUND should be notified about as well as a copy of the full divorce order, if not previously submitted.

Details of Ex spouse

Title: Mr Mrs Miss Ms

Surname:

First Name:

Contact Address:

Postal Code:

Contact No.:

Alternative contact

Title: Mr Mrs Miss Ms

Surname:

First Name:

Contact No.:

Exit details

Exit Date:

Exit Code:

(Refer to the below for Exit Codes).

(Date exit is the first day out of service).

Cause of Death:

EXIT CODES

- 70 RETRENCHMENT / WITHDRAWAL
- 71 RETIREMENT / RETRENCHMENT
- 72 DEATH
- 73 VOLUNTARY WITHDRAWAL
- 68 SECTION 14
- 81 ABSCONDED

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

Cause of Employee's Debt:

Compensation of damaged caused by an employee

Contributions Refunded:	<input type="text"/>	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"/>	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"/>
Housing Loan:	<input type="text"/>	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"/>	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"/>
Theft:	<input type="text"/>	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"/>	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"/>
Dishonesty:	<input type="text"/>	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"/>	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"/>
Fraud:	<input type="text"/>	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"/>	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"/>
Misconduct:	<input type="text"/>	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"/>	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"/>

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, 1998.
 - 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) .

Details of debt

This section is NOT applicable for death exit code.

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

1. CASH (Complete your Bank details below). . %

2. EXTERNAL TRANSFER. . %

* Number of annuities purchased (Max 4).

If option 2 is selected please ensure a REGISTERED INSURER TRANSFER DETAIL form (TDF) is completed per annuity purchased.

* The number of annuities purchased must be indicated in the case of split transfers.

Benefit option

Member bank details

Name of the Account Holder:

Bank Name:

Branch Code:

Account No.:

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).

Declaration by member

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: [Grid]

First Name: [Grid]

Identity/Passport No.: [Grid]

Date: [D][D][M][M][Y][Y][Y][Y]

Member's Signature

Declaration by employer representative

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

Surname: [Grid]

First Name: [Grid]

Identity/Passport No.: [Grid]

Date: [D][D][M][M][Y][Y][Y][Y]

Employer Contact No.: [Grid]

Branch / Division Name: [Grid]

Email address: [Grid]

Signed on behalf of Employer

Official Company Stamp

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