

3. MEMBER'S BANK DETAILS

Payments cannot be made to credit cards, loan accounts or call accounts. Please include proof of bank account, not older than three months.

Name of accountholder

Name of bank

Account number

Account type

Branch name

Branch number

4. TRANSFER TO ANOTHER APPROVED FUND

(Please include and/or attach the application form if applicable and any other relevant details.)

Type of fund (please indicate only one)

- PENSION FUND
 PROVIDENT FUND
 ANNUITY OR RETIREMENT ANNUITY FUND
 RETIREMENT
 PRESERVATION PROVIDENT FUND
 PRESERVATION PENSION FUND

New fund name

SARS approval number

Reference number which will be used for transfer

FSCA registration number

5. WITHDRAWAL NOTIFICATION

OPTIONS ON WITHDRAWING FROM YOUR EMPLOYER'S RETIREMENT FUND

Please read this section carefully, so that you are fully aware of all your options, you may also wish to seek expert financial advice to ensure that the decisions you make address your specific needs. Please note that the details below are not intended to be advice as contemplated in terms of the Financial Advisory and Intermediary Service Act 2002. For more information about this section please contact your Financial Planner.

PRESERVATION FUND

ONLY tick if this option is applicable

Advantages

- Your fund value is preserved for your retirement years.
- No tax is paid on transfer to another preservation fund.
- There is a choice of underlying investment portfolios.
- You are entitled to one withdrawal prior to retirement, provided that you do not take a cash withdrawal before you transfer to the preservation fund. This one withdrawal is taxable.

Disadvantages

- The allowance of the taxable cash withdrawal will reduce your ultimate retirement benefit.

