

Please tick appropriate block: Evergreen  Orion  Easy Benefit Plan

Please refer to the reverse side of this form for guidelines on how to complete the form.

If there is not enough space on the form for all your beneficiaries, please make a photocopy of this form, complete and return together with the original form.

### Complete using block letters

Employer Name		Scheme Code	
Member Surname		Member Full Names	
Member Reference Number		ID Number/Passport Number	
Home Telephone Number		Cellphone Number	
Marital Status:	Single <input type="checkbox"/>	Married <input type="checkbox"/>	Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/>

I hereby nominate the following persons, who are my dependants and/or nominees, for any benefits due to be paid from the scheme in the event of my death

	Surname	Full Names	Title	ID/Passport Number	Contact Telephone Number	Relationship (e.g. spouse, partner, daughter, son, mother, friend, etc.)	Financially dependent on Member (Y/N)	% Share
Dependants								
Other Nominees								
<b>Very Important – the column on the right MUST add up to 100%</b>								100%

I understand that this nomination cancels all previous nominations, if any, that I have made with respect to my membership of the abovementioned scheme.

Member's signature \_\_\_\_\_ Date \_\_\_\_\_

#### IN RESPECT OF PENSION AND PROVIDENT FUND ONLY:

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 nominees, as may be deemed equitable. Dependants are defined according to specific criteria in the Act and may either be legal or factual dependants. Your nomination will serve as a guide to the Trustees when making these decisions.

Please give your completed form to your employer for safekeeping and ensure that the form is updated when applicable. For Evergreen clients, you are welcome to return your completed form to Old Mutual SuperFund, PO Box 167, Cape Town 8000 or fax it to 0860 383 848. We do, however, advise that Evergreen clients give a copy to your employer for safekeeping.

## Nominating beneficiaries for your death benefits

Should you die while still a contributing member of the SuperFund, a death benefit will be paid to your dependant/s and/or beneficiary/ies. The benefit consists of a death cover amount (if applicable) plus your accumulated credit in the Fund. Please refer to your Member Benefit Statement for more information.

**Please complete a new beneficiary nomination whenever the information on this form changes, for example your marital status, number of children or any addresses. Give any special instructions or additional information in a separate letter to this form.**

### Step 1: List your dependants and beneficiaries

1. First list the details relating to your husband/wife in the space provided. If you have more than one wife, a customary law wife or a life partner (i.e. someone with whom you live as if married, whether same sex or other), please include their details.
2. Next, list ALL your children, including those adopted, from previous marriages or born outside of marriage. Include the name of their current guardian (if not you) and the name of the person who will be their guardian, should you die.
3. Now list any legal dependants, such as a divorced wife from a previous marriage to whom you are paying maintenance, or anyone else who receives financial support from you (for example an aged parent, a family member or even a friend).
4. Finally, if there is anyone else whom you would like to receive a part of your benefit, list these beneficiaries, under "Other Nominees" on page 1.

### Step 2: Share the benefit

After you have listed all your dependants and beneficiaries, you need to decide how much (if any) of your benefit you would like them to receive.

Keep in mind that –

- Not everyone on the list needs to have a share allocated to him/her.
- The more beneficiaries you choose to receive a share, the smaller each individual's benefit may be.
- The percentages in the 'Share of Benefit' column must add up to a total of 100%.

In the case of Pension and Provident Funds the Trustees will have the final say in how your benefit is divided, as they need to comply with the Pension Funds Act.

### Step 3: Give additional motivation

To distribute your benefit as fairly as possible, it would help the Trustees (or your Employer, in the case of risk-only schemes) to understand why you have proposed certain share allocations to your beneficiaries.

For example, a member may propose that one minor child receives a large share while the other minor child receives nothing, if the one is disabled and the other has a very good scholarship.

Write your motivation(s) in a letter and return with this form, thereby assisting the Trustees in understanding your share allocation.