



Please complete accurately, using CAPITAL/BLOCK LETTERS in blue or black ink. Tick blocks where appropriate.

FUND DETAILS

Protektor Preservation Pension Fund

Reference numbers																				

Protektor Preservation Provident Fund

Reference numbers																				

PLEASE SEND THE COMPLETED FORM TO:

Email protektor@oldmutual.com
Fax +27 021 509 2125

SECTION 1 MEMBER DETAILS

Surname

First names

Identity number (passport number if foreign national)

Passport country of issue

Address

Postal code

Suburb

City

Telephone Code No. Cellphone number

Email address

Please enclose an original certified copy of your identity document.

SECTION 2 WITHDRAWAL BENEFIT PAYMENT OPTIONS

Please complete Section 2A if you are making a full withdrawal, Section 2B if you are making a partial withdrawal or Section 2C if you are emigrating.

SECTION 2A FULL WITHDRAWAL

Full Cash withdrawal

Part Cash/Part Transfer to another approved Fund

· Cash amount before tax R

· Please specify to which approved Fund (including a Preservation Fund) the remainder of your savings should be transferred:

Full name of approved fund

Transfer full benefit to another approved fund*

*Please attach a copy of your proposal or application form.

SECTION 2B PARTIAL WITHDRAWAL

Cash amount before tax** R

**Please note that you cannot take another cash withdrawal from this investment.

SECTION 2C EMIGRATING

Emigration withdrawal

Please attach the following documents:

- i. A letter from the Authorised dealer to confirm that the emigration was recognised by the South African Reserve Bank for purposes of exchange control;
- ii. A copy of the Tax Clearance Certificate (TCC) in respect of emigrations issued by SARS; **or**
- iii. A copy of the 'Tax Compliance Status - Pin issued'; **or**
- iv. An affidavit indicating the reason a TCC cannot be provided; and
- v. A copy of the Certificate of Residence obtained from the relevant **Tax Authority** of the country you reside in

Withdrawal due to Visa Expiry

Please attach the following documents:

- i. A copy of the Certificate of residence obtained from the relevant Tax Authority of the country you reside in
- ii. A copy of the passport indicating the exit from South Africa
- iii. A copy of the Visa indicating the expiry date and the applicable paragraph in the definition of "Visa" in Section 1 of the Immigration Act in terms of which the visa was issued

PLEASE NOTE:

We are unable to calculate an after-tax amount. The cash withdrawal amount indicated will be reduced by the tax payable on the withdrawal amount. The gross amount required must be indicated, and this must include provision for tax.

SECTION 3 YOUR INCOME TAX DETAILS

Tax number

SECTION 4 COURT ORDERS

Do you have any divorce order(s) and/or maintenance court order(s) against your benefit? YES NO

If "YES", please attach: - original certified copy/copies of the relevant court order(s); and
- in the case of divorce court order(s), contact details of your former spouse/s (if not already supplied to Old Mutual).

SECTION 5 YOUR BANK ACCOUNT DETAILS

Name of account holder

Name of bank Name of branch

Account number Bank branch code

Type of account Cheque Savings

SECTION 6 DECLARATION BY MEMBER

- I understand that Old Mutual will deposit my benefit into the above account upon receipt of the necessary tax clearance from the South African Revenue Service.
- I understand that payment of my full investment amount in terms of the Rules of the Protektor Pension Fund/Provident Fund as requested above shall be in full and final settlement of the aforesaid Fund's liability towards me in respect of my investment therein.
- I understand that other deductions may be made from the withdrawal benefit in terms of Section 37D of the Pension Funds Act, the Maintenance Act and/or the Divorce Act, prior to the payment of the withdrawal benefit to me.
- I understand that where the withdrawal is:
 - a full withdrawal; I will have no further claim against the Protektor Preservation Provident Fund in respect to my initial investment.
 - a partial withdrawal; I cannot take another cash withdrawal from this investment, and my balance will only be payable to me on retirement, death or disability in terms of the Rules of the Fund; or on emigration (subject to the terms allowed in the Income Tax Act).

Member's signature

Date



Old Mutual is a Licensed Financial Services Provider