

Please print in block letters using black or blue ink.

Participating Employer

Scheme Code/Quote Number:

Inception Date of Risk Benefits:

Risk Provider (if Old Mutual, please indicate if SuperFund Integrated Risk):

**NOTE:** If the Risk Provider is not Old Mutual, please ensure that the Risk Provider is notified of the cancellation. Old Mutual will not action any requests without confirmation from the risk provider.

### POLICY PROTECTION RULE 4 - COOLING-OFF RIGHTS

#### Old Mutual SuperFund Choice and Customised Clients

##### Rule 4.2a

The policyholder may cancel this contract if no benefit has been paid or claimed yet, or no event insured under the contract has occurred. Cancellation requires written notice to the insurer within 31 days of the date on which the policyholder receives the disclosure details (provided by Old Mutual) required in terms of the Policyholder Protection Rules (Long-term Insurance), 2017.

##### Rule 4.3

All premiums paid for the cancelled policy up to, or after, the date that Old Mutual receives the written cancellation notice, will be refunded to the policyholder, subject to the deduction of the cost of any cover enjoyed.

#### Old Mutual SuperFund Easy Clients

##### Rule 4.5

Where a policy cannot, by law, be cancelled, or is by virtue of its terms and nature not capable of being cancelled, such fact must be disclosed to the policyholder by the intermediary or insurer before entering into the policy.

Old Mutual SuperFund Easy is a pre-packaged product, which requires that both the retirement funding and risk benefits be selected.

Please refer to section 4.3 of the Risk Policy Rules:

The policyholder may not cancel the contract while the participating employer remains a participating employer under the "Easy" option of the Retirement Fund and is not eligible to transfer from SuperFund Easy to any of the other Old Mutual SuperFund retirement fund solutions.

### INSTRUCTIONS FOR PARTICIPATING EMPLOYER

Please complete sections A or B (see explanations of each section) and send these to your scheme intermediary.

#### INSTRUCTIONS FOR INTERMEDIARIES

Once received from the Participating Employer, please send the completed form to your appointed Sales Consultant, who should then send the completed document to: **SuperFundRequotes@oldmutual.com**

- If you are not a SuperFund Easy client, please only complete **Section A**
- If you are a SuperFund Easy client, please only complete **Section B**

### SECTION A

Indicate by means of a tick in each applicable box, which of the cover items listed below must be cancelled for the named risk policy/policies:

<input type="checkbox"/> Approved Group Life Assurance	<input type="checkbox"/> Unapproved Group Life Assurance
<input type="checkbox"/> Approved Accident Death Benefit	<input type="checkbox"/> Unapproved Accident Death Benefit
<input type="checkbox"/> Approved Lump Sum Disability Benefit	<input type="checkbox"/> Unapproved Lump Sum Disability Benefit
<input type="checkbox"/> Group Income Protection	<input type="checkbox"/> Temporary Income Protection
<input type="checkbox"/> Family Cover	<input type="checkbox"/> Lifestyle Cover
<input type="checkbox"/> Other please specify <input type="text"/>	

If any benefits must be changed, but not cancelled, please list these risk benefits and explain the required changes:

**FURTHER INSTRUCTIONS**

Please tick YES, NO or N/A\* next to each of the relevant instructions below

		YES	NO	N/A*
1	If risk premiums are <b>included</b> in employer contributions - The total employer contribution % should be reduced by the risk benefit premium %, which may result in an amendment to the special rules <sup>2</sup> .			
2	If risk premiums are <b>included</b> in the employer contributions - The total employer contribution % should remain unchanged, but the contribution towards retirement funding should be increased. Any contributions already paid should be re-allocated towards retirement funding <sup>3</sup> .			
3	If risk premiums are <b>excluded</b> from the employer contributions - The total employer contribution % should be increased by the risk premium %. Any premiums already paid should be re-allocated towards retirement funding <sup>3</sup> .			
4	If a <b>risk only scheme</b> - The total premium should be reduced by the cancelled risk benefit premium %, which may result in an amendment to the special rules <sup>2</sup> .			
5	If a <b>risk only scheme</b> - all the risk benefits should be cancelled <sup>1</sup> .			

\*Not Applicable to the policy being cancelled

**BANKING DETAILS**

Please provide banking details for any refund of premiums already paid to Old Mutual SuperFund in respect of the cancelled risk policy. If the risk provider is not Old Mutual, the relevant risk provider will be responsible for the refund of premiums on instruction.

Name of bank

Branch name

Branch code

Name of account holder

Account number

Account type:  Current  Savings  Transmission

I, the undersigned, duly authorised, request to exercise my right to cancel the Risk Policies within the cooling off period of 31 days of the date on which I have received from Old Mutual the required Risk Cover details selected by me (as required by the Policyholder Protection Rules).

Signed at (place)  on (date)

Employer Signature

For (Full Name and Company Registration number of Employer)

and duly authorised thereto in my capacity as

**SECTION B**

- 1) I would like to cancel my full Old Mutual SuperFund Easy fund as no contributions have been paid to Old Mutual SuperFund
- 2) I have 5 or more Employees with a minimum total contribution of R15 000 per month and would like to request an Old Mutual SuperFund Choice Retirement Fund quote. YES  NO

<sup>1</sup> This includes both the approved and unapproved risk policies that form part of the package.

<sup>2</sup> **Please note:** All premiums paid by the Participating Employer to Old Mutual up to the date of receipt of the written cancellation notice, or received at any date thereafter in respect of the cancelled Risk Policy, will be refunded. If the Risk Provider is not Old Mutual, Old Mutual SuperFund will not be able to refund money to members until the Risk Provider has paid the premiums into the Old Mutual SuperFund bank account.

<sup>3</sup> **Please note:** All premiums paid by the Participating Employer to Old Mutual up to the date of receipt of the written cancellation notice, or received at any date thereafter in respect of the cancelled Risk Policy, will be re-allocated towards Retirement funding. If the Risk Provider is not Old Mutual, Old Mutual SuperFund will not be able to re-allocate money to members until the Risk Provider has paid the premiums into the Old Mutual SuperFund bank account.

Signed at (place)

on (date) 

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Employer Signature

For (Full Name and Company Registration number of Employer)

and duly authorised thereto in my capacity as

## COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT (PPI, POPI)

Old Mutual SuperFund may collect, use and share your personal information for the following purposes:

- To administer your membership of the Old Mutual SuperFund;
- To provide you with information about offerings that will support and enhance your retirement benefits;
- To provide products or services to you, to carry out the transaction you requested and to maintain our relationship;
- For underwriting purposes;
- To assess and process claims;
- To conduct credit reference searches or verification;
- To confirm and verify your identity, address or banking details;
- To verify that you are an authorised user for security purposes;
- For maintaining the accuracy of your personal information;
- For operational purposes, and where applicable, credit scoring and assessment and credit management;
- For purposes of claim checks (e.g. the Industry Life and Claims Register);
- For the detection and prevention of fraud, crime, money laundering or other malpractice;
- To trace you where you are uncontactable;
- To conduct market or customer satisfaction research or for statistical analysis;
- For audit and record keeping purposes;
- For social responsibility purposes;
- In connection with legal proceedings;
- Sharing information with your employer (its intermediary/broker), your intermediary/broker (when applicable), service providers we engage to process such information on our behalf or who render services to us. These service providers may be abroad, but we will not share your information with them unless we are satisfied that they have adequate security measures in place to protect your personal information;
- To comply with legal and regulatory requirements or industry codes or when otherwise allowed by law.

You agree that we may view, search and update your information and you further agree we may, where required, process your special personal information (and share this information with relevant third parties) in order to achieve a purpose set out above.

You warrant that when you give us personal information about third parties, this information is accurate and correct, and you have received their permission to share their personal information with us.

You confirm that if you are giving consent for a person under 18 (a minor) you have the required authority to do so.

We may transfer your personal information to another country for processing or storage. We will ensure that anyone to whom we pass your personal information agrees to treat your information with the same level of protection as we are obliged to.

You may access the personal information that we hold about you and may also request us to correct any errors or, under certain circumstances request us to delete this information. In certain circumstances, you have the right to object to the processing of your personal information. To do this, simply contact us at the numbers/addresses listed below and specify what information you would like or if you have any questions about this Notice, please contact us at:

- SuperFund Service Centre: 0860 20 30 40
- [superfund@oldmutual.com](mailto:superfund@oldmutual.com)

You have the right to complain to the Information Regulator, whose contact details are:

- [www.justice.gov.za/inforeg/index.html](http://www.justice.gov.za/inforeg/index.html)
- General enquiries: [enquiries@infoeregulator.org.za](mailto:enquiries@infoeregulator.org.za)

Complaints (complete POPIA/PAIA form 5)

- [paiacomplaints@infoeregulator.org.za](mailto:paiacomplaints@infoeregulator.org.za) should your PAIA request be denied or there is no response from a public or private bodies for access to records you may use this email address to lodge a complaint.
- [popiacomplaints@infoeregulator.org.za](mailto:popiacomplaints@infoeregulator.org.za) - should you feel that your personal information has been violated, you may use this email address to lodge a complaint.

Please visit [www.oldmutual.co.za/corporate/retirement-funds/superfund-privacy-policy](http://www.oldmutual.co.za/corporate/retirement-funds/superfund-privacy-policy) to read the full version of the Fund Member Privacy Notice.

