



I would like to retire!

Before you begin! You need to have this information at hand to submit your claim:

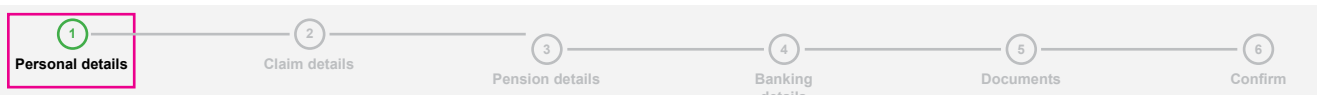
1. Your identity and passport number
2. The cell-phone number you used when you registered for MyClaim
3. Your tax number
4. The completed new business application form for the monthly pension you have purchased
5. Your banking details

MYCLAIM PROCESS: Log into MyClaim.

Click [here](#) to the guide on how to register or log into MyClaim

YOU ONLY HAVE 6 STEPS TO COMPLETE

1 Complete your personal details



In this section you will complete your personal details:

- Personal cellphone number (to provide you with updates regarding the progress of your claim)
- Personal email address (Do **NOT** use your work email address)
- Residential address
- Details of your financial adviser

2 Complete your claim details



View the values in each of your pots.

What you have saved so far			
R 884 490.08	R 884 490.08	R 0.00	
<small>Total benefit value</small>	<small>Cash withdrawal limit</small>	<small>Min. annuity purchase</small>	
Benefit breakdown			
	Total benefit value	Cash withdrawal limit	Min. annuity purchase
<input checked="" type="checkbox"/> Vested provident pot <input type="radio"/>	R 659 890.57	R 659 890.57	R 0.00
<input checked="" type="checkbox"/> Vested pension pot <input type="radio"/>	R 188 495.41	R 188 495.41	R 0.00
<input checked="" type="checkbox"/> Savings pot <input type="radio"/>	R 31 533.18	R 31 533.18	R 0.00
<input checked="" type="checkbox"/> Retirement pot <input type="radio"/>	R 4 572.92		
Total	R 884 490.08	R 879 917.16	



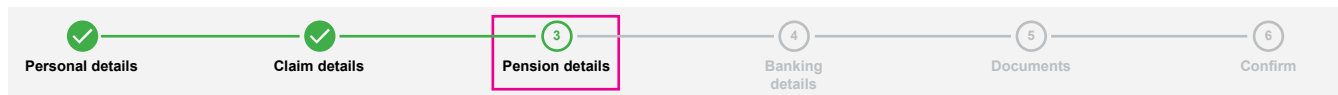
- Read through all the options and choose the one you would like to select.
- This member selected to “Take some of your retirement savings in cash and buy a pension with the rest”

Before you select an option
Before you make a final decision about what to do with your retirement savings, make sure you understand your options and are able to decide on the right options for you by discussing these options with your financial adviser.

Please select what you would like to do with your retirement savings

- Keep your retirement savings in the Fund
Not taxable until you withdraw
- Take some of your retirement savings in cash and buy a pension with the rest
Includes tax implications
- Buy a Pension with your entire retirement savings
Not taxable until you withdraw
- Transfer all of your retirement savings into another approved fund
Not taxable until you withdraw or retire
- Take the maximum amount in cash
Includes tax implications

3 Complete the Pension details section



- Click on Rands / Percentage to indicate how much money you would like to take in cash.
- This member chose to take 30% in cash and buy an annuity with 70% of the benefit value

Step 3 of 6
Tell us about the pension products you're purchasing

Take some of your retirement savings in cash and buy a pension with the rest

R 884 490.08 R 884 490.08
Total benefit value Cash withdrawal limit

R 884 490.08 Vested pot R 0.00 Savings pot R 0.00 Retirement pot

Capture the amounts in RANDS **PERCENTAGES**

Cash value
% 30

Take maximum cash

Annuity value
% 70

- The member chose “Old Mutual Fund Select Annuity” and allocated 100% of the benefit to it.
- Alternatively, the member could have chosen more than one annuity product, by clicking on the “ADD ANOTHER FUND”
- Click on CONTINUE

Pension product details

Please provide the following details of the pension product from which you are purchasing your pension.

Fund details	Rand split	Percentage split
<input type="checkbox"/> OLD MUTUAL FUND SELECT ANNUITY (CAT E&H)	R 619 143.06	100.00 %

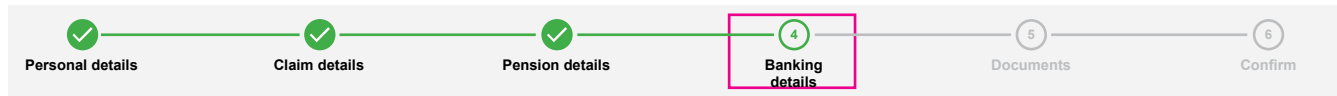
ADD ANOTHER FUND +

TOTAL : R 619 143.06 100 % / R 619 143.06

PREVIOUS CONTINUE



4 Complete the Banking details section



- Complete the “banking details” section, with banking details that are in your name.
- In the instance where you have selected to take some of your retirement savings in cash it will be paid into this bank account you complete on this screen.
- **NB:** You may be requested to provide proof of banking details, if we cannot validate the banking details provided.

Step 4 of 6
Let's talk financials

Banking details

Bank name
▼ PostBank - South African Post Office Bank

Branch code
460005

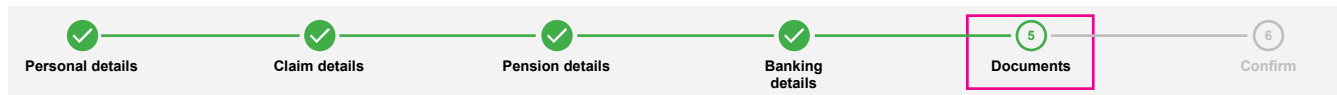
Branch name
SA POSTBANK SOC LTD

Account number
01234567

Account Type
 Current Account Savings Account

PREVIOUS CONTINUE

5 Upload the required documents



- Upload the requested forms.
- This member needed to upload the **New Business Application Form** and **Bank Statement if the bank validation failed**.

Step 5 of 6
Before you go, we need a couple of documents

Please provide us with the following documents

- ▶ Proposal/Application Form of Receiving Fund
- ▶ Bank Statement

Note: Documents or images must not be password protected and can be PDF or JPG format but must not exceed the size of 10MB each

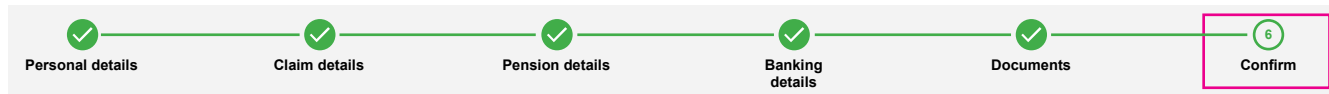
Proposal/Application Form of Receiving Fund
Application form.pdf
Max 10 MB

Bank Statement
Bank statement.pdf
Max 10 MB

PREVIOUS CONTINUE



6 Accept Terms and Conditions and submit the claim



- Accept terms and conditions and click on “Accept & Submit Claim” to submit the claim for Employer confirmation.
- Read the disclaimer!

Please read through and accept the terms and conditions, related to your claim, before you submit

I accept the [terms & conditions](#)

i Once you have submitted your claim you will not be able to make any changes to the details on this claim. Please make sure all of the information provided is correct before continuing.

[PREVIOUS](#) [ACCEPT & SUBMIT CLAIM](#)

Download the Claim Summary

[DOWNLOAD THE CLAIM SUMMARY](#) [DONE ->](#)

- Click on “DOWNLOAD THE CLAIM SUMMARY” to download a summary of all the details you have just submitted
- Click on “DONE” to complete the process.

NB. Once submitted, you can download the “Claim Summary.” This is a record of your submitted claim. You cannot change your option once you have submitted.