APPLICATION FOR SETTLEMENT OF DIVORCE BENEFITS BY NON-MEMBER SPOUSE

OLDMUTUAL

Please complete in BLOCK LETTERS using black or blue ink.

PLEASE EMAIL, THE COMPLETED FORM AND SUPPORTING DOCUMENTS TO:

Old Mutual Corporate Administration and Servicing

Email divorceclaims@oldmutual.com

TO BE COMPLETED BY THE NON-MEMBER SPOUSE IN THE EVENT OF A DIVORCE SETTLEMENT CLAIM

Note:
An application by the non-member spouse for the settlement of a divorce award will only be deemed to have been received once all the required documents and information are in the possession of this office.

The following documents must accompany this application (please tick appropriate box):	Already supplied	Attached	N/A
• Original certified copy of non-member spouse Identity Document	☐	☐	☐
• Original certified copy of the Divorce Court Order	☐	☐	☐
• Original certified copy of any Settlement Agreement that has been made an order of court	☐	☐	☐
• Application forms for transfer to another approved fund	☐	☐	☐

SECTION 1: MEMBER'S DETAILS

Scheme name

Scheme code

Reference number

First name(s)

Surname

Date of birth D D M M Y Y Y Y

ID number

SECTION 2: NON-MEMBER SPOUSE'S DETAILS

Title: Mr ☐ Ms ☐ Mrs ☐ Other Initials

Surname*

First name(s)*

RSA ID number* Income tax number*

Passport number* (if not a South African citizen)

Country of issue* (complete if not an RSA citizen)

Date of marriage* D D M M Y Y Y Y Date of divorce* D D M M Y Y Y Y

Residential address*

Complex number and name

Street number and name

Suburb City/Town Code

Postal address (complete only if different from residential address)*

Complex number and name

Street number and name

Suburb City/Town Code

Contact details (at least one contact detail must be supplied)*

Telephone (Work) Code | | | | | | No. | | | | | | | Cellphone number | | | | | | | | | |

Email

***Completion of these fields are mandatory.**

SECTION 3: PAYMENT OPTIONS

Notes:

- The divorce award may be taken in cash or transferred to another approved pension, provident, pension preservation, provident preservation or retirement annuity fund. Transfer of benefits to a preservation fund can only be to one preservation fund and cannot be split amongst more than one.
- As from 1 March 2012 the non-member is the taxpayer when claiming a divorce award - this applies to all divorce orders, irrespective of the date of divorce.
- Where the divorce order was granted before 13 September 2007, the award is tax-free, whether taken in cash or transferred to another fund. If you transfer the divorce award to another fund, this tax-free award will be taxed when you eventually leave such fund.
- A divorce claim will only be regarded as legal and binding on the Fund once all the required documents and data as specified in this form have been received and the court order/settlement agreement has been confirmed as legally binding on the Fund.
- The same investment return (whether positive or negative) earned on the assets of the member's account will be added from the date on which the claim has been confirmed as legal and binding on the Fund to date of payment.
- If all the data and supporting documentation is not received within a period of 120 days from date on which Old Mutual has requested the data and documentation, the investment return will only be calculated from the expiry of the 120 days until date of payment.
- It is strongly recommended that you preserve your benefit. To ensure that you make an informed decision, you should talk to a financial adviser. If you do not have your own financial adviser, contact **0860 38 88 73** (Sharecall) or email **membersupportservices@oldmutual.com**.

Benefit Options – select one of these options [indicate choice with a tick (✓)]

☐ **1. Transfer full benefit to another approved Fund.** Attach copy of proposal or application form.

Full name of approved Fund

Note: In terms of the Two-Pot legislation, the value transferred to the other approved Fund will be transferred in the same proportions as the original member's benefit split amongst the Savings, Vested and Retirement Pots.

TRANSFER FUND CONTACT PERSON DETAILS

First name(s)

Surname

Telephone number Code | | | | | | No. | | | | | | |

Email

☐ **2. Cash Lump Sum.** If this option elected, complete the banking details section option below.

Non-member spouse's banking details (for cash payments) (This must be your own bank account.)

BANKING DETAILS

Account holder's name

Bank

Branch name

Account number

Branch code

Account type: Cheque ☐ Savings ☐

FUND MEMBER AND BENEFICIARY PRIVACY NOTICE

This notice applies to members and beneficiaries of the Fund[1].

The Fund may collect, use and share personal information for the following purposes:

- To administer a member's membership of the Fund;
- To process and pay benefits from the Fund;
- To provide members with information about offerings that will support and enhance their 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;
- To comply with legal and regulatory requirements or industry codes or when otherwise allowed by law;
- Sharing information with a member's 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;
- Sharing information with other insurers, retirement funds and retirement annuity funds to obtain claim related information.

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:
Old Mutual Fund Service Centre: 0860 20 30 40

You have the right to complain to the Information Regulator, whose contact details are:
Website: **inforegulator.org.za**
General enquiries: **enquiries@inforegulator.org.za**
Complaints: **popiacomplaints@inforegulator.org.za**

You can also view our full Privacy Notice here.

Non-member spouse's signature

Date D D M M Y Y Y Y

[1] In this notice "the Fund" refers to the Fund in which the member is a participant.

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