

**WITHDRAWAL REQUEST FOR VISA EXPIRY,
CESSATION OF SA RESIDENCY AND
EMIGRATION WITHDRAWAL**

Please complete this form and send it and your account to us:

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

Important Notes

Members of Preservation Funds who have already made use of the once-off withdrawal prior to retirement, can withdraw the full benefit before the member elect to retire if the person has formally emigrated from South Africa (and that emigration was recognised by the South African Reserve Bank (SARB)) or on expiry of a work or visitor's visa.

If you are in the process of emigrating and you have submitted the requisite documentation (MP336(b)) to the Authorised Dealer (bank) that is managing your financial emigration on or before 1 March 2021, AND the emigration is accepted by SARB on or before 28 February 2022, the reason "emigration withdrawal" can be used.

In all other instances, members of preservation funds who have emigrated, will only be allowed to withdraw their benefit before retirement if the person has ceased to be a resident for an uninterrupted period of three (3) years or longer from the date on which they ceased to be a SA resident.

Options (select ONE only)

Cessation of SA Residence

Visa Expiry

Emigration Withdrawal (can ONLY be used after 1 March 2021 for those in the process of formally emigrating and where emigration accepted by SARS before 28 February 2022)

Compulsory supporting documentation required
Cessation of SA Residence

	Attached (✓)
Certificate of residence issued by the Tax Authority of the Country of Residence (cannot be older than 6 months)	
Copy of SARS Tax Compliance Certificate (TCC)	
Copy of Passport indicating entry in and out of South Africa	

Visa Expiry

	Attached (✓)
Certificate of residence issued by the Tax Authority of the Country of Residence (cannot be older than 6 months)	
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	
Copy of a Passport indicating exit from South Africa	

Emigration Withdrawal

	Attached (✓)
Certificate of residence issued by the Tax Authority of the Country of Residence (cannot be older than 6 months)	
Letter from the Authorised Dealer confirming emigration was recognised by the SARB for purposes of exchange control	
A copy of the Tax Compliance Certificate (TCC) in respect of emigrations issued by SARS; OR A copy of the "Tax Compliance Status - PIN issued"; OR An affidavit indicating the reason why a TCC cannot be provided	

SECTION 1 MEMBERS DETAILS

Surname																															
First name(s)																															
Identity number											(passport number if foreign national)																				
Please enclose a certified copy of your identity document																															
Passport country of issue																															
Address																										Postal code					
Suburb																															
City																															
Telephone	Code						No.						Cellphone number																		
Email address																															

SECTION 2 WITHDRAWAL BENEFIT

Full cash withdrawal

SECTION 3 YOUR INCOME TAX DETAILS

Tax number

SECTION 4 YOUR BANK ACCOUNT DETAILS

Name of account holder																															
Bank name																Branch name															
Account number																Branch code															
Account type:	<input type="checkbox"/> Current	<input type="checkbox"/> Savings																													

SECTION 5 PROTECTION OF PERSONAL INFORMATION DISCLOSURE

Protektor Preservation Fund may collect, use and share your personal information for the following purposes:

- To administer your membership of the Protektor Preservation Fund;
- 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:

· Member Call Centre: 0860 20 30 40

· ProtektorEnquiriesComplaints@oldmutual.com

You have the right to complain to the Information Regulator, whose contact details are: www.justice.gov.za/inforeg/index.html

General enquiries: enquiries@inforegulator.org.za

Complaints (complete POPIA/PAIA form 5)

- PAIAComplaints@inforegulator.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@inforegulator.org.za should you feel that your personal information has been violated, you may use this email address to lodge a complaint.

Please visit <https://www.oldmutual.co.za/corporate/protektor-preservation/protektor-customer-privacy-notice> to read the full version of the Fund Member Privacy Notice.

SECTION 6 DECLARATION BY MEMBER

- I understand that Old Mutual will deposit my benefit into the account upon receipt of the necessary tax clearance from South African Revenue Service.
- I understand that the payment of my full (remaining) investment amount as requested above shall be a full and final settlement of the aforesaid Fund's liability towards me in respect of my investment therein, and that I will have no further claim against the Protektor Preservation Fund.
- 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 the Divorce Act, prior to the payment of the withdrawal benefit to me.

Member's signature

Date

D	D	M	M	Y	Y	Y	Y
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