OLDMUTUAL

PROTEKTOR PRESERVATION FUND RETIREMENT CLAIM FORM

Please complete in BLOCK LETTERS using black or blue ink.

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 (0)21 509 2125

SECTION 1 MEMBER DETAILS

Title | Surname

First name(s)

Identity number

Date of birth D D M M Y Y Y Y

Passport number (where no South African ID number is available)

Country of issue of passport

Income tax number (compulsory where member has worked in South Africa)

Cellphone number

Telephone number Code | No.

Postal address

Postal code

Email address

SECTION 2 BANK ACCOUNT DETAILS (member's own bank account)

Name of account holder

Bank name | Branch name

Account number | Branch code

Account type: ☐ Cheque ☐ Savings

SECTION 3 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).

If any period of service was served outside South Africa, please state country and period of such service.

Period from D D M M Y Y Y Y | Period to D D M M Y Y Y Y

Country

Old Mutual Life Assurance Company (South Africa) Limited, Registration Number 1999/004643/06.

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SECTION 4 RETIREMENT DETAILS

Type and date of retirement (Please tick)

Normal retirement ☐ D D M M Y Y Y Y

Ill-health/Retirement ☐ D D M M Y Y Y Y

Benefit options: (NB: Please consult the Rules of your Fund before making your choices)
Before electing your option(s), please read the following section regarding the Old Mutual Fund Select Annuity option available to members at retirement.

BENEFIT PAYMENT OPTIONS

- Your retirement/Ill-Health benefit is the total value of your Old Mutual Protektor Member Account.
- Ill-Health Benefit: Attach the Declaration of Ill Health Form to this Claim Form. This can be obtained from www.oldmutual.co.za/superfund/forms or by phoning the Service Centre on 0860 20 30 40. If your disability is approved by the Fund's Trustees, it is paid to you as a retirement benefit. Please therefore read the below points as well.
- Retiring from a pension fund: You have the option to elect a maximum of one-third of the available benefit as a cash lump sum, the balance being utilised to purchase a compulsory annuity. However, if your total retirement benefit from your pension fund is R247 500 or less, the total benefit may be taken in cash.
- Retiring from a provident fund: You have the following options:
  - a full cash benefit is payable, if you were a member of the Protektor Provident Fund on 1 March 2021. If you transferred a benefit to the Protektor Provident Fund after 1 March 2021, please contact the Old Mutual Member Service Centre to confirm the cash value available on retirement,
  - purchase a compulsory annuity instead of the cash benefit,
  - or a combination of the above.
- All options elected must be in terms of the Rules of Protektor (which can be obtained from the Fund). It is advisable to consult a financial adviser to assist you in making the right choices best suited to your own personal needs and circumstances. You can obtain assistance from your own financial adviser. If you do not have your own financial adviser, contact 0860 38 88 73 (Sharecall) or email membersupportservices@oldmutual.com and a member support service consultant will put you in contact with an accredited Old Mutual financial adviser.

OLD MUTUAL FUND SELECT ANNUITY

When electing full or partial purchase of annuities, you have the option of electing the Old Mutual Fund Select Annuity, which is a generic best fit for retiring members and is endorsed by the trustees of the Old Mutual SuperFund. The annuity has standard features and is based on a favourable annuity rate basis negotiated by the trustees and limited choice is afforded within set parameters.

Do you wish to utilise the Old Mutual SuperFund Select Annuity option? YES ☐ NO ☐

If you want a quotation, please call 0860 38 88 73.

PROTEKTOR PRESERVATION PENSION FUND

☐ Full pension – purchase an annuity.

Name of underwriter

(Please attach copy of fully completed and signed application/proposal form)

☐ To commute ☐ (max. one-third) of the pension for a cash lump sum and apply the balance to purchase an annuity.

Name of underwriter

PROTEKTOR PRESERVATION PROVIDENT FUND

☐ Purchase an annuity with your full benefit.

☐ Take a portion of the benefit in cash, and purchase an annuity with the balance.

Portion to be taken in cash: R ☐ **(NB** please read the notes above under Benefit Payment Options for more information about the cash value available on retirement)

Annuity to be purchased from:

Name of underwriter

(Please attach copy of fully completed and signed application/proposal form)

☐ Pay full benefit in cash. **(NB** please read the notes above under Benefit Payment Options for more information about the cash value available on retirement)

SECTION 5 DECLARATION BY MEMBER

The options in terms of the Rules of the Fund have been fully explained to me and I confirm that I fully understand the implications of the choices elected.

Member's signature ☐ Date D D M M Y Y Y Y

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Old Mutual Life Assurance Company (South Africa) Limited, Registration Number 1999/004643/06 is a licensed FSP and Life Insurer.

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