



MYCLAIM EMPLOYEE | QUICK REFERENCE GUIDE

OLDMUTUAL

DO GREAT THINGS EVERYDAY

TWO-POT
RETIREMENT SYSTEM





HOW TO SUBMIT YOUR EXIT CLAIM ON MYCLAIM PROCESS.

01

Employee

Completes online form on the secure digital platform - MyClaim.



Employer Confirmation



- Confirms employee exit date and reason on payroll file
- Confirms any prior claims

02

03

Fund Administrator

Processes claim and pays out claim





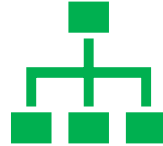
HOW TO SUBMIT YOUR EXIT CLAIM ON MYCLAIM.

1. Log in to the Old Mutual website



Log in or **Signup** on the Old Mutual website by clicking **here**.

2. Access MyClaim



Click on your Fund to access MyClaim.

3. Complete and Submit the online form



- Complete your personal details
- Complete your claim details
- Provide supporting material
- Accept the terms and conditions and submit the claim for Employer Confirmation

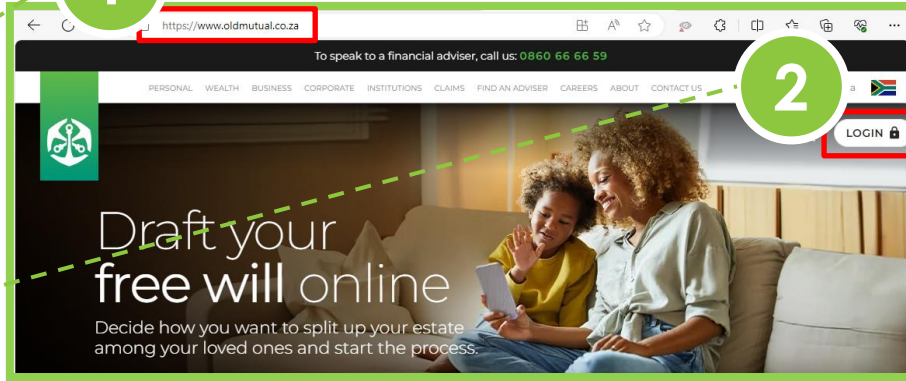


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Link to <https://oldmutual.co.za/> on your browser



Click on **Login**

Complete the form with your username and password

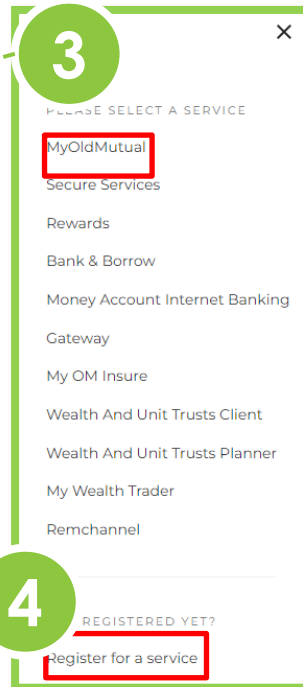
Click on **LOG IN** if you have registered before OR



Click on **MyOldMutual** to Login **OR**

Click on **Register for a service** if not yet registered.

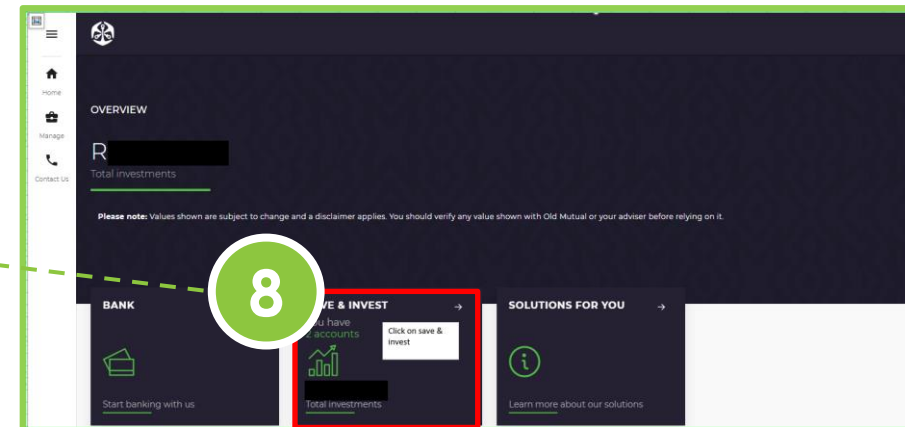
3



Click on **Signup** to register by following the steps

Once logged in, Click on **SAVE & INVEST**

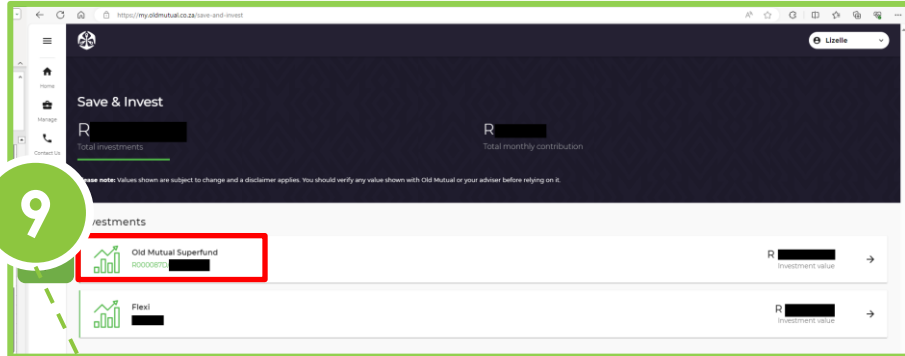
8



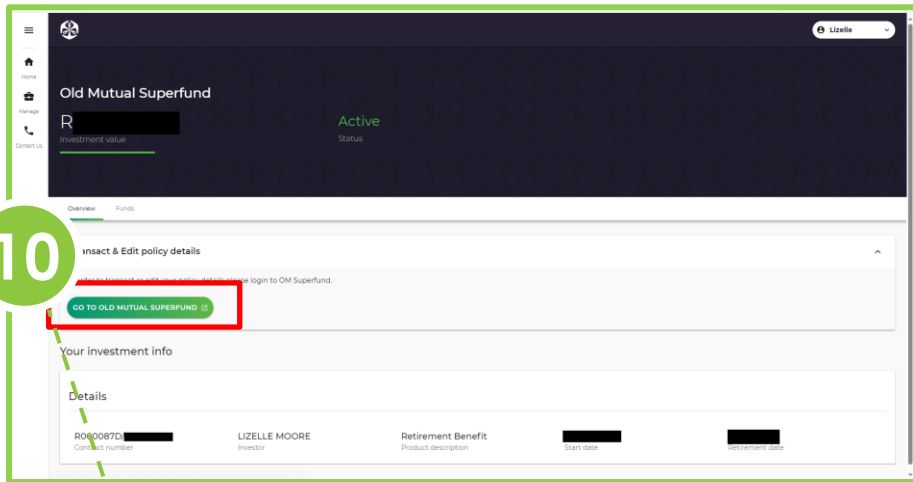


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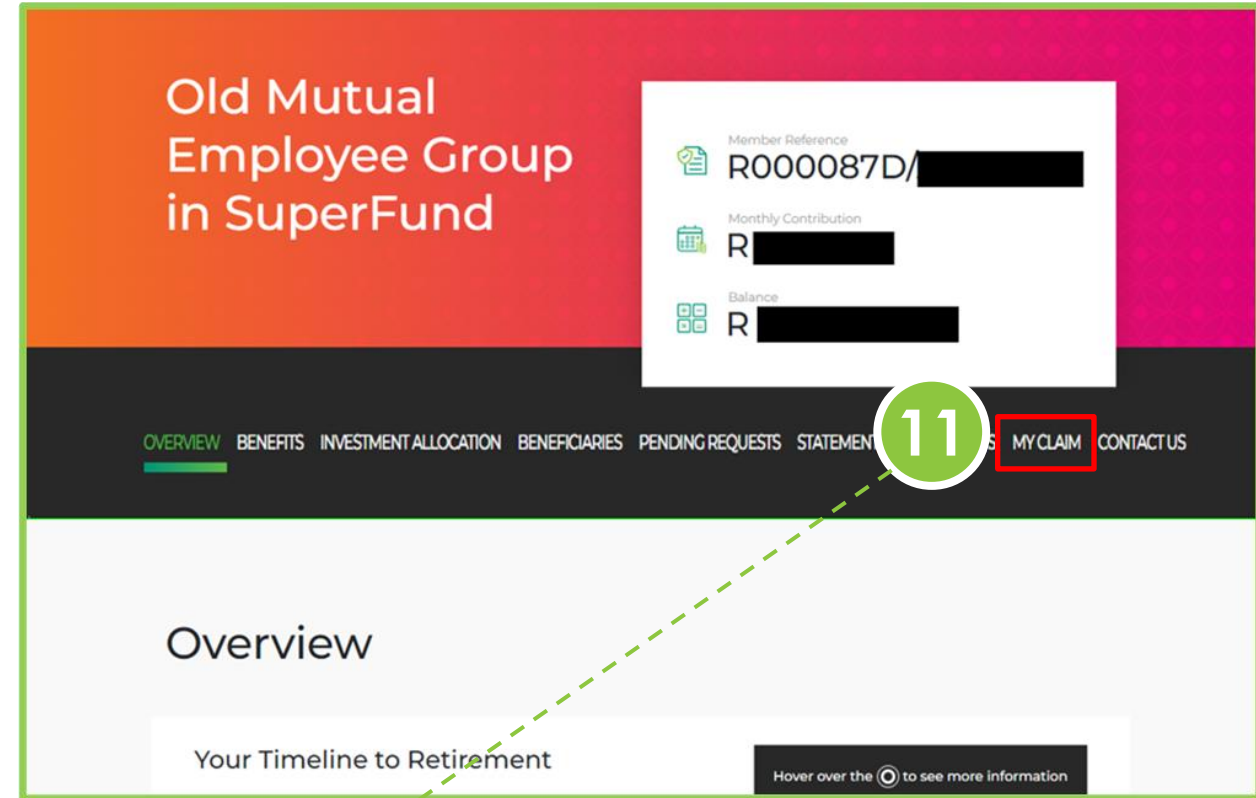
OLDMUTUAL



Click on the relevant membership/contract.



Click on **GO TO OLD MUTUAL SUPERFUND**



Click on **MYCLAIM** to access the online form

Please reach out to the call centre during office hours should you need assistance: **0860 20 30 40**



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Before you begin

Before you begin your claims journey please make note of the following things you will need to complete the claims form:

1. Exit date and reason

If your fund is linked to your employer, make sure to align with your employer on your **exit date** (the date you are leaving your company) and **exit reason** (why you are leaving).

2. Banking details

If you are claiming a full or part cash pay out you'll need to provide your banking details and you may need to provide proof of your bank account.

3. Transfer fund details

If you are transferring your funds you'll need to provide a copy of your application to the new fund (where applicable).

4. Court orders

You will be asked if you have any divorce order(s) and/or maintenance court order(s) against your benefit. If you do then supporting documentation will be required depending on the court order.

5. Additional supporting documentation

As you go through the completion of your claim you may be asked to provide additional supporting documentation.

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CONTINUE

NOTE: Before commencing the claims journey, ensure that you read the details displayed on screens carefully and ensure that you have all the relevant information and documents to continue. Click **CONTINUE** to start completing the online form.

“**Personal Details**” form is prepopulated with available information. Complete any missing information.

Click on **CONTINUE** once you have completed all the details.

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Page 1 of 3
Tell us a bit about yourself

Personal Details

Mrs Filipe MODISELLE
Title & full name

25/06/1997
Date of birth

9708210894084
ID Number

Please note
If your Full Name and Surname, Date of birth and Identity number/ Passport number are incorrect kindly contact our call centre on 0860 20 30 40 to update your details. Any other personal details can be updated on this form.

Tax Number
0574927257

Are you a tax payer in another country other than South Africa?
 Yes No

Personal contact details

Please note
Please ensure you provide contact details indicating how we can contact you after leaving from the service or your employer.

Cellphone number
0813755299

Email Address
rfacorporatetesting@oldmutual.com

Residential Details

Unit number

Complex name

Street number

Street name

Suburb

City

Postal Code

The postal address is the same as the residential address

Postal Address

PO Box Address line 1

City

Postal Code

Financial adviser details (Optional)

Do you have a Personal Financial Adviser?
 Yes No

CONTINUE

Have any questions?
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist
0860 20 30 40.

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Complete the Claim Details

Step 2 of 4

Let's cover some details about your claim

Please select what you like to do with your retirement savings

Exit details

Below are the exit details that your employer has indicated to us.

Exit date: 30/05/2024

Exit reason: Resignation

Please note
If you disagree with the exit date and/or reason provided by your Employer, please have a discussion with your Employer to align on the exit date and reason.

Benefit payment options

Total benefit value: R 296 866.40
Cash withdrawal limit: R 296 866.40

Potential claims against your benefit

Please note
According to Section 37D of the Pension Funds Act, if your employer indicates to Old Mutual that there has been any damages caused by fraud, theft, dishonesty or misconduct it will be settled through your claim before pay out or transfer.

Do you have a divorce court order that should be settled from your scheme?
 Divorce Court Order

PREVIOUS

CONTINUE

Have any questions?
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist. **0860 20 30 40.**

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Click **CONTINUE** to move to the next step

NOTE: The following pop-up note will be displayed

Click on **YES** to continue or **NO** to change the Benefit Payment Option Selection.

Please Note

Are you sure you want to continue with the Exit Reason you've selected?

NO **YES**

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Should this pop-up be displayed, click on **GO BACK TO MY CLAIM** to rectify errors.

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Error

- Postal Code is a required field.
- City/Town is a required field.
- Postal Code is a required field.

GO BACK TO MY CLAIM



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Step 3 of 6
Tell us about the retirement fund you're transferring to

Withdraw some of your money and transfer the rest

R 296 866.40 Total benefit value	R 296 866.40 Cash withdrawal limit
-------------------------------------	---------------------------------------

Cash value
R ▾ 100 000.00
* Please note, the cash value will be subject to tax.

Transfer value
R ▾ 196 866.40

Retirement fund details

Please provide the following details of the retirement fund or annuity you are transferring your funds to.

Insurer & retirement fund name

Percentage of money to be transferred to the fund

Contact name (optional)

Contact number (optional)

Fund bank name

Fund bank account

PREVIOUS

Have any questions?
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist
0860 20 30 40.

Click on **CONTINUE** to progress to Banking Details

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Complete banking details

Step 3 of 5
Let's talk financials

Banking Details

Bank name

Branch code

Account number

Account Type

Current Account Savings Account Pension Account

PREVIOUS

Have any questions?
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist
0860 20 30 40.

Click on **CONTINUE** to progress documents

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The progress bar, shows you the steps you have completed and what is outstanding

Attach the required documents

Click on **CONTINUE** to confirm

The screenshot shows a progress bar at the top with five steps: Personal details, Claim details, Banking details, Documents, and Confirm. The first four steps are marked with green checkmarks, and the fifth step, 'Confirm', is marked with a green circle containing the number 5. Below the progress bar, the main content area is titled 'Step 4 of 5' and 'Before you go, we need a couple of documents'. A red box highlights the progress bar. Another red box highlights the document upload section, which contains the text 'Please provide us with the following documents' and 'No documents required.' Below this, there is a note: 'Note: Documents or images must not be password protected. They can be pdf or jpg but not exceed 10MB.' At the bottom of the document upload section, there are two buttons: 'PREVIOUS' and 'CONTINUE'. A red box highlights the 'CONTINUE' button. A third red box highlights the 'CONTINUE' button. A green circle with the number 22 points to the progress bar. A green circle with the number 23 points to the document upload section. A green circle with the number 24 points to the 'CONTINUE' button.

The screenshot shows an error message with a red exclamation mark icon at the top. The text reads 'Error'. Below this, there are two error messages, each preceded by a red triangle warning icon. The first message says 'Bank Statement is a required document, please upload it via the Documents Page'. The second message says 'Sorry we're unable to validate your banking details, please upload a bank statement no older than 3 months as proof.' At the bottom of the error message, there is a green button with the text 'GO BACK TO MY CLAIM'. A red box highlights the 'GO BACK TO MY CLAIM' button. A green circle with the number 25 points to the 'GO BACK TO MY CLAIM' button.

NOTE: If there are any errors, a message will be displayed as per example above

Click on **GO BACK TO MY CLAIM** to rectify the errors



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NOTE: If the Benefit Payment Option selected is **Part Cash/Part Transfer to Another Approved Fund** the “**Confirm**” page will reflect **Transfer Details**.

Read through the terms and conditions and tick the check box

Click on **ACCEPT & SUBMIT CLAIM**

Page 6 of 8
Confirm your form details

Personal details Mr Daryn Bailey Title & full name 921004007085 ID Number 98202177 Tax Number Contact details 082490583 Cellphone number sparko2@oldmutual.com Email address Residential address 2, Jan Smuts Drive, Pinelands Cape Town 7745 Residential address Claim details Designation Exit reason 30/05/2024 Exit date Take some of your retirement savings in cash and transfer the rest to another approved Fund Benefit payment option Transfer details R 100 000.00 Cash value R 196 866.40 Transfer value Fund details PROTEKTOR PRESERVATION PENSION FUND Insurer Contact name Contact number	Banking details PostBank - South African Post Office Bank Bank name SA POSTBANK SOC LTD Branch name PostBank - South African Post Office Bank Branch Code 4567900 Account number Current Account Account type Documents Protektor_IPS_Member_Version.pdf 155KB 867000000063.pdf 155KB ClaimSummary.pdf 155KB
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Please read through and accept the terms and conditions, related to your claim, before you submit

I accept the [terms & conditions](#)

PREVIOUS ACCEPT & SUBMIT CLAIM

Have any questions?
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist
0860 20 30 40.

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

I accept the [terms & conditions](#)

PREVIOUS ACCEPT & SUBMIT CLAIM

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0860 20 30 40.



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Your claim has been successfully submitted

Your claim has now been sent to your employer to approve. Once your claim has been approved by your employer, please allow up to **10 working days** to process and authorise your claim.

You're reference for this claim is your **member number: 10253846** Look out for further communication on the status of your claim.

Next Steps



Employer approval

Your exit details(why you are leaving and when you are leaving) will be submitted to be approved by your employer.



Claim processing

Your claim will be processed by the administration team to double check the details you've provided.



Tax application

Your claim will be submitted to SARS for a tax directive. SARS will inform us of how much tax must be deducted from your scheme money.



Claim authorisation

Your claim will then be sent to be authorised by our team and the pay out will be triggered.



Claim pay out & transferred

Your claim is then paid into your account and the rest of your money will be transferred into your new annuity fund(s).

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Read through at the above for all the processing steps.

Click on Done to exit the portal

NOTE: We will keep you informed on the progress via SMS.

NOTE: Once you have submitted your claim, it will go to your Employer to confirm.

You will have the option to:
DOWNLOAD A SUMMARY
of the claim details you
completed

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DOWNLOAD SUMMARY

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DONE →

Please reach out to the call centre (08:00 -17:00) should you need assistance: **0860 20 30 40**



PLEASE NOTE THE CONTACT DETAILS FOR ADDITIONAL SUPPORT:

Secure Services registration or login:

Email: help-secure@oldmutual.com

Call **0860 60 65 00**

Personal detail updates:

Call centre: **0860 20 30 40**

Financial Advice (Benefit Options)

- Consult your personal Financial Advisor or
- Employer appointed Financial Advisor or
- Old Mutual Consultant - Email:
membersupportservices@oldmutual.com
Call: **0860 38 88 73**



THANK YOU!

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RETIREMENT SYSTEM

Old Mutual Life Assurance Company (SA) Limited is a licensed FSP and Life Insurer.