



# WITHDRAWAL AND RETIREMENT CLAIMS PROCESS

Are you leaving your job? Whether it's due to resignation, retrenchment, dismissal, or retirement, here's how to claim your retirement savings.

## YOUR QUICK START GUIDE

### BEFORE YOU CLAIM

You'll have a **range of options** depending on whether you're resigning, retiring, etc. Be sure to speak to your trusted financial advisor, who can help you make the best choice for your financial goals.

### STEP 1

## FIND THE FORM ONLINE

Go to [oldmutual.co.za](https://oldmutual.co.za) or scan the QR code.

Click on login.

If you haven't already, you'll be asked to sign up on our online platform, Secure Services. Your profile can take up to 24 hours to become activated.



SCAN ME



### STEP 2

## COMPLETE THE CLAIM FORM

Fill in your personal details, accurately. Incorrect information can cause claim delays.

Provide details about your claim, including your exit details, payment option, and any outstanding court orders.

Upload any supporting documents.

Confirm, accept the Terms & Conditions, and click "Submit". This will now go to your employer for confirmation.

Select "My Old Mutual".

Login with your My Old Mutual credentials.

Click on SAVE & INVEST

Click on "Old Mutual SuperFund"

Click on "Go to Old Mutual SuperFund"

In Member Web, click on "MyClaim" to access the claim form.

### ARE YOU RETIRING?

If you have elected to take up the Old Mutual SuperFund Living Annuity product, please contact the Retirement Benefits Counsellor (RBC) before submitting a claim on MyClaim:

- [SuperFundannuity@oldmutual.com](mailto:SuperFundannuity@oldmutual.com)
- 021 503 0069



## HOW TO TRACK YOUR CLAIM

When you submit your claim, you'll be notified via SMS that the claim is now with your employer. We will keep you informed via SMS on the progress of your claim. If you need any assistance or support, please contact the call centre at 0860 20 30 40.