# LIFE GUARANTEED ANNUITY BENEFICIARY NOMINATION FORM

**Please print in block letters**

Pensioner's full name

ID number | Income tax number

Scheme code | Reference number

**Should I pass away during the Guaranteed Period and not be survived by a second life, I nominate the following persons to receive the present value of the remaining pension instalments for the Guaranteed Period, to be paid to them in the portion reflected below, as a lump sum.**

| INITIALS | SURNAME | DATE OF BIRTH | ID NUMBER | CONTACT NUMBER/S | EMAIL ADDRESS | RELATIONSHIP TO PENSIONER | MONTHLY PENSION |
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**I understand that:**

- The persons nominated above will only receive the present value of the remaining pension instalments for the Guaranteed Period if:
  - my Policy **does not provide** for a pension to be paid to a Second life; or
  - my Policy **does provide** for a pension to be paid to a Second Life, but the Second Life passes away either before me or before the Guaranteed Period has expired.
- Where the present value of the remaining pension instalments for the Guaranteed Period is payable to nominees, and if one of the nominees passes away before me, and I did not amend this nomination, such nominee's portion will be equally divided by Old Mutual amongst the remaining nominees. Where all nominees have pre-deceased me, the present value of the remaining pension instalments for the Guaranteed Period will be paid to my estate.
- By completing a new Beneficiary Nomination Form and sending it to Old Mutual, all my prior nomination(s) will be cancelled once Old Mutual receives my new Form.
- If I do not nominate any beneficiaries or I do not leave a valid Beneficiary Nomination Form, the pension due for the balance of the Guaranteed Period will be paid as a lump sum to my estate unless my Policy provides for it to be paid to a Second Life.
- In order for my Beneficiary Nomination Form to be valid, it must be signed by myself in the presence of two witnesses (both of whom are over the age of 18 and are not nominated as beneficiaries on this Form) and must be received by Old Mutual prior to my death.
- A valid nomination will remain in effect even if my circumstances change. Accordingly, I also understand that I should review my Beneficiary Nomination Form from time to time given that my circumstances may change – e.g. divorcing my spouse or leaving my life partner, getting re-married, death of a nominated beneficiary or birth of a child.
- Where my nomination is wholly or partly invalid, Old Mutual may make additional rules and procedures for the payment of my pension for the balance of the Guaranteed Period, as Old Mutual considers appropriate. If Old Mutual is unable to pay the pension in accordance with these guidelines, it may pay the relevant amount to my deceased estate.
- If I make a mistake or change my mind when completing this Form, I must not use correction fluid. Instead, I can amend by crossing out and adding the correct detail, and then both I and the two witnesses must initial the change.

**I may alter my nomination at any time by notifying Old Mutual Pencare Department in writing and returning it to them at:**

**Old Mutual Pencare**
**PO Box 3628**
**Cape Town 8000**

**Email** **pencare@oldmutual.com**
**Telephone** **0860 40 60 90**

Signature of pensioner | Date

Signature of witness 1

Print name

Signature of witness 2

Print name

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