



OLD MUTUAL SUPERFUND UNCLAIMED BENEFITS PRESERVATION PROVIDENT/ PENSION FUND CLAIM FORM

Please print in block letters using black or blue ink.

FUND DETAILS

Old Mutual Superfund Unclaimed Benefits Preservation Provident Fund S000600D

Member No. Member No. Member No.

Old Mutual Superfund Unclaimed Benefits Preservation Pension Fund S000601D

Member No. Member No. Member No.

MEMBER'S PERSONAL DETAILS (please complete in full)

Title: Mr Ms Mrs Other

Surname

First name(s)

RSA ID number Date of birth

Income tax number (compulsory where member is a registered taxpayer)

Residential address Postal code

Postal address Postal code

CONTACT DETAILS

Telephone (H) Code No. (W) Code No.

Cellphone number Fax Code No.

Email address

PREFERRED METHOD OF COMMUNICATION

Telephonic (Please specify the preferred channel: Home, Work or Cell)

Via email Via postal address Via fax

TYPE OF CLAIM

Withdrawal Retirement Ill-health retirement Death

CLAIM DATE

Date of Withdrawal/Retirement/Ill-Health Retirement or Death

Important Notes:

- Withdrawal - must be the same date as the date on which this claim form is signed.
- Retirement - must be the first of the month following the month in which retirement age is reached. This date cannot be more than 30 days from the date on which this form is signed.
- Ill Health Retirement - must be the date on which the medical practitioner signed the Declaration of Disability Form.
- Death - date of death as per death certificate

COURT ORDERS

Do you have any divorce order(s) against your benefit which have not been settled under the originating fund(s)? YES NO

If "YES", please attach:

- original certified copy/copies of the relevant court order(s); and
- contact details of your former spouse/s

BENEFIT PAYMENT OPTIONS - WITHDRAWAL

The Fund rules allow for the withdrawal benefit to be:

- Paid in cash (which is taxable in excess of limits as per the Income Tax Act);
- Transferred to another approved fund subject to the rules of the receiving fund permitting it and provided that:
 - if you are in the UBF Pension Fund, you may only transfer to another approved pension fund, pension preservation fund or retirement annuity fund.
 - if you are in the UBF Provident Fund, you may only transfer to another approved provident fund, pension or provident preservation fund or retirement annuity fund.
- The option that you select will have an impact on your retirement savings. It is therefore important to obtain assistance before selecting your option. 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 financial adviser.

BENEFIT PAYMENT OPTIONS - RETIREMENT/ILL HEALTH RETIREMENT

- For **Ill-health Retirement** a Declaration of Disability form must be completed.
- When you **retire 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.
- When you **retire from a Provident Fund** the following options are available:
 - a full cash benefit is payable
 - purchase a compulsory annuity in lieu of the total benefit due
 - or a combination of the above
- All options elected must be in terms of the Rules of the Fund (which can be obtained from the Fund) and 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 financial adviser.

IMPORTANT NOTICE - DEATH

- If death occurred prior to the transfer to the Old Mutual SuperFund Unclaimed Benefits Preservation Provident /Pension Fund, the death benefit will be taxed as a withdrawal benefit and paid into the estate bank account, or to the person appointed as the Representative if no Estate.
- If death occurred after the transfer to the Old Mutual Superfund Unclaimed Benefits Preservation Provident/Pension Fund, the payment of Death Benefits is governed by Section 37C of the Pension Funds Act (Section 37C places the responsibility for the distribution of a deceased member's death benefit on the Fund's Board of Trustees).

BENEFIT PAYMENT OPTIONS

WITHDRAWALS

<input type="checkbox"/> PENSION FUND (i) Transfer full benefit to another approved Fund. Attach copy of proposal or application form. <ul style="list-style-type: none"> • Protektor Pension Preservation Fund <input type="checkbox"/> • Other approved Pension/Pension Preservation/Retirement Annuity Fund: <input type="checkbox"/> Full name of approved fund: <input style="width: 100%;" type="text"/> (ii) Full Cash <input type="checkbox"/>	<input type="checkbox"/> PROVIDENT FUND (i) Transfer full benefit to another approved Fund. Attach copy of proposal or application form. <ul style="list-style-type: none"> • Protektor Provident Preservation Fund <input type="checkbox"/> • Other approved Provident/Pension or Provident Preservation/Retirement Annuity Fund <input type="checkbox"/> Full name of approved fund: <input style="width: 100%;" type="text"/> (ii) Full Cash <input type="checkbox"/>
Please note: Any cash amount will be reduced by any tax payable on it (if applicable).	

RETIREMENT/ILL HEALTH RETIREMENT

<input type="checkbox"/> PENSION FUND Please select ONE of the options below: (i) <input type="checkbox"/> Full Compulsory Annuity (ii) <input type="checkbox"/> To commute R <input style="width: 100px;" type="text"/> or <input style="width: 50px;" type="text"/> % (max, one-third) of total available benefit for cash lump sum and the remainder to a compulsory annuity. Please complete the table below and attach copies of application/proposal form(s). Name of annuity product <input style="width: 100%;" type="text"/> Name of registered insurer <input style="width: 100%;" type="text"/> Contact name <input style="width: 100%;" type="text"/> Contact number (<input style="width: 50px;" type="text"/>) <input style="width: 50px;" type="text"/> Address of registered insurer <input style="width: 100%;" type="text"/> <input style="width: 100%;" type="text"/> Postal code	<input type="checkbox"/> PROVIDENT FUND Please select ONE of the options below: (i) <input type="checkbox"/> Purchase a Compulsory Annuity in lieu of the total benefit due (ii) <input type="checkbox"/> Cash of <input style="width: 50px;" type="text"/> % or R <input style="width: 100px;" type="text"/> and the remainder to a compulsory annuity. Please complete the table below and attach copies of application/proposal form(s). Name of annuity product <input style="width: 100%;" type="text"/> Name of registered insurer <input style="width: 100%;" type="text"/> Contact name <input style="width: 100%;" type="text"/> Contact number (<input style="width: 50px;" type="text"/>) <input style="width: 50px;" type="text"/> Address of registered insurer <input style="width: 100%;" type="text"/> <input style="width: 100%;" type="text"/> Postal code
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BANK ACCOUNT DETAILS (Must be your bank account, or in the case of death - estate late or appointed representative bank account.)

Name of Account Holder	<input style="width: 100%;" type="text"/>
Bank name	<input style="width: 100%;" type="text"/>
Branch name	<input style="width: 100%;" type="text"/>
Account number	<input style="width: 100%;" type="text"/>
Branch code	<input style="width: 100%;" type="text"/>
Type of account	<input type="checkbox"/> Cheque <input type="checkbox"/> Savings

COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT (PPI, POPI)

Old Mutual SuperFund Unclaimed Benefits Preservation Fund may collect, use and share your personal information for the following purposes:

- To administer your membership of the Old Mutual SuperFund Unclaimed Benefits 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:

- Service Centre: 0860 455 455 or 0860 33 77 77
- unclaimedbenefitpresfund@oldmutual.com

You have the right to complain to the Information Regulator, whose contact details are:

- www.justice.gov.za/infoereg/index.html
- General enquiries: enquiries@infoeregulator.org.za

Complaints (complete POPIA/PAIA form 5)

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

Please visit www.oldmutual.co.za/corporate/unclaimed-benefits-fund/privacy-notice to read the full version of the Fund Member Privacy Notice.

DECLARATION BY MEMBER/BENEFICIARY/EXECUTOR/REPRESENTATIVE OF ESTATE

I confirm that I fully understand the options in terms of the Rules of the fund and I confirm that I fully understand the implications of the choices elected. I also certify that all particulars furnished in this form and accompanying documentation are true and correct

Signature

Date

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