

Particulars of Fund / Employer (continued)

Participating Fund Employer Name

Type of fund:

Pension

Provident

Pension Preservation

Provident Preservation

Postal Address

Postal Code

Indicate whether this fund is:

A public sector fund

An approved fund

Other

Specify other

Particulars of Gross Lump Sum Due

Reason for directive:

Transfer

Divorce - Transfer

Par (eA) Transfer/ Payment

Transfer Unclaimed Benefit

Divorce - Member Spouse

Divorce - Non-Member Spouse

Resignation

Withdrawal

Termination of Employment (Retrenchment)

Future Surplus

Emigration Withdrawal

Withdrawal due to Visa Expiry

Cessation of SA Residence

Unclaimed Benefit

Security of Mortgage Bond Order / Housing Loan

Two Pot-Transfer: All Components (Inter-Fund Transfer)

Two Pot-Divorce Transfer: All Components (Inter-Fund Transfer)

Two Pot-Par (eA) Transfer/ Payment : All Components (Inter-Fund Transfer)

Gross amount of lump sum payment R

Date of accrual (CCYYMMDD)

Date on which membership commenced (CCYYMMDD)

Date of divorce order (CCYYMMDD)

If a public sector fund, the period, if any, during which the member was a member of another public sector fund:

Date From (CCYYMMDD)

Date To (CCYYMMDD)

= Completed years

Period of employment taken into account in terms of the rules of the fund:(only applicable to Public Sector funds)

Date From (CCYYMMDD)

Date To (CCYYMMDD)

= Completed years

In the case of a Provident fund:

Total contributions by member to the fund up to 1 March 2016 (excluding profit and interest)

R

Total contributions to the fund after 1 March 2016 (excluding profit and interest)

R

Transfer from Pension Fund (after tax amount)

R

Directive number for pension transfer

Transfer by Non-member spouse previously taxed

R

Indicate Two Pot transfer values:

Gross amount in Vesting component

R

Gross amount in Retirement component

R

Gross amount in Savings component

R

Particulars of Gross Lump Sum Due (Continued)

If a policy of insurance is ceded to the member, state the surrender value as at date of cession (for the purpose of paragraph 4(2)bis of the Second Schedule)

R

,

Where member contributions to the fund have exceeded such amounts as allowed for deduction against income, state total amount of excess contributions

R

,

Former AIPF member's contributions transferred to the fund

R

,

Particulars of Transfer

Did the fund pay any portion of the lump sum payment into another fund?

Yes

No

If 'YES', state the registered name of the transferee fund

The transferee fund type:

Pension Fund

Provident Fund

Retirement Annuity Fund

Pension Preservation Fund

Provident Preservation Fund

Unclaimed Pension Preservation

Unclaimed Provident Preservation

Fund Approval no.

18204

FSCA Registration no.

12 / 8 / 00

/

Participating Employer Name

E-mail address of transferee fund

Tel no. of transferee fund

Cell no. of transferee fund

Is the transferee fund a Public Sector Fund?

Yes

No

Amount transferred to the transferee fund

R

,

Amount attributed to Pre – 1 March 2021 Provident Fund vested rights plus growth

R

,

Amount attributed to Post – March 2021 Provident Fund value

R

,

Specify the values of the amounts pertaining to Two Pot transfers

Amount in the Vested component transferred to Vested component

R

,

Amount in the Vested component transferred to Retirement component

R

,

Amount in the Retirement component transferred to Retirement component

R

,

Amount in the Savings component transferred to Savings component

R

,

Amount in the Savings component transferred to Retirement component

R

,

State if the transfer of the benefit is subject to special conditions. If yes, confirm the applicable provision in the fund rules.

Was there a partial withdrawal taken from this benefit in the previous or current fund prior to this payment?

Yes

No

(If yes, state the details below:)

Date of partial withdrawal (CCYYMMDD)

Amount of partial withdrawal

R

,

Directive number

Amount of partial withdrawal

R

,

Date of partial withdrawal (CCYYMMDD)

Directive number

Non Resident Service Rendered inside the Republic [Section 9(2)(i)]

Total number of months services were rendered outside the Republic while contributing to fund			
---	--	--	--

Period of Employment in Public Sector Fund (excluding AIPF)	
1990-1994	1995-1999
2000-2004	2005-2009
2010-2014	2015-2019
2020-2024	2025-2029
2030-2034	2035-2039
2040-2044	2045-2049
2050-2054	2055-2059
2060-2064	2065-2069
2070-2074	2075-2079
2080-2084	2085-2089
2090-2094	2095-2099
2100-2104	2105-2109
2110-2114	2115-2119
2120-2124	2125-2129
2130-2134	2135-2139
2140-2144	2145-2149
2150-2154	2155-2159
2160-2164	2165-2169
2170-2174	2175-2179
2180-2184	2185-2189
2190-2194	2195-2199
2200-2204	2205-2209
2210-2214	2215-2219
2220-2224	2225-2229
2230-2234	2235-2239
2240-2244	2245-2249
2250-2254	2255-2259
2260-2264	2265-2269
2270-2274	2275-2279
2280-2284	2285-2289
2290-2294	2295-2299
2300-2304	2305-2309
2310-2314	2315-2319
2320-2324	2325-2329
2330-2334	2335-2339
2340-2344	2345-2349
2350-2354	2355-2359
2360-2364	2365-2369
2370-2374	2375-2379
2380-2384	2385-2389
2390-2394	2395-2399
2400-2404	2405-2409
2410-2414	2415-2419
2420-2424	2425-2429
2430-2434	2435-2439
2440-2444	2445-2449
2450-2454	2455-2459
2460-2464	2465-2469
2470-2474	2475-2479
2480-2484	2485-2489
2490-2494	2495-2499
2500-2504	2505-2509
2510-2514	2515-2519
2520-2524	2525-2529
2530-2534	2535-2539
2540-2544	2545-2549
2550-2554	2555-2559
2560-2564	2565-2569
2570-2574	2575-2579
2580-2584	2585-2589
2590-2594	2595-2599
2600-2604	2605-2609
2610-2614	2615-2619
2620-2624	2625-2629
2630-2634	2635-2639
2640-2644	2645-2649
2650-2654	2655-2659
2660-2664	2665-2669
2670-2674	2675-2679
2680-2684	2685-2689
2690-2694	2695-2699
2700-2704	2705-2709
2710-2714	2715-2719
2720-2724	2725-2729
2730-2734	2735-2739
2740-2744	2745-2749
2750-2754	2755-2759
2760-2764	2765-2769
2770-2774	2775-2779
2780-2784	2785-2789
2790-2794	2795-2799
2800-2804	2805-2809
2810-2814	2815-2819
2820-2824	2825-2829
2830-2834	2835-2839
2840-2844	2845-2849
2850-2854	2855-2859
2860-2864	2865-2869
2870-2874	2875-2879
2880-2884	2885-2889
2890-2894	2895-2899
2900-2904	2905-2909
2910-2914	2915-2919
2920-2924	2925-2929
2930-2934	2935-2939
2940-2944	2945-2949
2950-2954	2955-2959
2960-2964	2965-2969
2970-2974	2975-2979
2980-2984	2985-2989
2990-2994	2995-2999
3000-3004	3005-3009
3010-3014	3015-3019
3020-3024	3025-3029
3030-3034	3035-3039
3040-3044	3045-3049
3050-3054	3055-3059
3060-3064	3065-3069
3070-3074	3075-3079
3080-3084	

[illegible]

Emigration Withdrawal

Please note: if the answer to any of the above questions is “Yes”, copies of the said documentation must be submitted as supporting documents to verify the validity of this request.

Cessation of SA Residency

Date of Cessation of SA Residency (CCYYMMDD)

--	--	--	--	--	--	--	--

Expiry of Working Visa

Was the visa issued in terms of paragraph (b) or (i) of the definition of visa in section 1 of the Immigration Act, no. 13 of 2002?

Yes☐

No☐

Did the visa expire?

Yes☐

No☐

Did the member exit South Africa?

Yes☐

No☐

Please note: if the answer to any of the above questions is "Yes", copies of the said documentation must be submitted as supporting documents to verify the validity of this request.

Declaration

I declare that the information furnished is true and correct in every respect.

Date (CCYYMMDD)

For enquiries go to www.sars.gov.za or call 0800 00 7277