



South African Revenue Service

Request for a Tax Deduction Directive Pension and Provident Funds - Events Before Retirement or Death

FORM B

FOR OFFICE USE

Application no.

Taxpayer Details

Taxpayer reference no. Year of Assessment ended on (CCYY)

Surname

First Name(s)

Initials Date of Birth (CCYYMMDD) Identity number

Passport/ Permit no. Passport Country / Country of Origin (e.g. South Africa = ZAF)

If the taxpayer/member is not registered for income tax, provide reason(s): Provide Reason(s)

Annual income R , Employee number

Is the taxpayer a non-resident? Yes No Is the certificate of residency (citizenship certificate only where DTA is not applicable) attached? Yes No

Residential Address

Postal Code

Postal Address

Postal Code

Particulars of Fund

Registered Name of Fund

Contact Person

E-mail address

Tel no. Membership number Fund Approval no. (Applicable to Public Sector Funds)

PAYE Reference no. FSCA Registration no.

FORM B

Version: v2023.00.01

Particulars of Fund (continued)

Participating 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 Transfer Unclaimed Benefit Par (eA) Transfer/ Payment Divorce - Member Spouse Divorce - Non-Member Spouse
 Resignation Withdrawal Termination of Employment (Retrenchment) Future Surplus Unclaimed Benefit Security of Mortgage Bond Order / Housing Loan
 Emigration Withdrawal Withdrawal due to Visa Expiry Cessation of SA Residence

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) ,

Transfer from Pension Fund (after tax amount) R ,

Directive number for pension transfer R

Transfer by Non-member spouse previously taxed

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:

Fund Approval no. (Applicable to Public Sector Funds)

FSCA Registration no. / /

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 ,

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

Date of partial withdrawal (CCYYMMDD)

Amount of partial withdrawal R ,

Directive number

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

Were any services rendered inside / outside the Republic during the period of membership of the fund? Yes No

Total number of months services were rendered while contributing to fund

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

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

