



South African Revenue Service

Request for a Tax Deduction Directive Retirement Annuity Funds

FORM C

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 reasons: Provide Reason(s)

Annual income R , Employee number

Is the taxpayer a non-resident? Yes No Is the certificate of residency (citizenship certificate 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. Policy number

PAYE Reference no. FSCA Registration no. Type of fund: Retirement annuity

FORM C

Particulars of Fund (continued)

Postal Address

	Postal Code

Indicate whether this fund is: An approved fund Other Specify other

Particulars of Gross Lump Sum Due

Reason for directive:

<input type="checkbox"/> Retirement	<input type="checkbox"/> Retirement due to ill health	<input type="checkbox"/> Death prior to Retirement	<input type="checkbox"/> Transfer prior to Retirement	<input type="checkbox"/> Discontinued Contributions	<input type="checkbox"/> Future Surplus
<input type="checkbox"/> Divorce - Member Spouse	<input type="checkbox"/> Divorce - Non-Member Spouse	<input type="checkbox"/> Divorce Transfer	<input type="checkbox"/> Emigration Withdrawal	<input type="checkbox"/> Withdrawal due to Visa Expiry	<input type="checkbox"/> Cessation of SA Residence

Date of accrual (CCYYMMDD)

Commencement date of policy (CCYYMMDD)

Date of death of member (if applicable) (CCYYMMDD)

Gross amount of lump sum payment (Including the amount deemed to be accrue in terms of par 2B of the Second Schedule) and amount attributed to Pre – 1 March 2021 Provident Fund vested rights plus growth

R ,

Total value of full annuity

R ,

Amount distributed to non-member spouse in respect of divorce order (if date of accrual is before 1 March 2012)

Date of divorce order (CCYYMMDD)

R ,

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

R ,

Transfer by non-member spouse previously taxed

R ,

On death of member prior to retirement from the fund before 1 October 2007: What amount would the taxpayer have derived in respect of the commutation of one-third of the annuity if he had Retired the day preceding his death?

R ,

On death of member prior to retirement from the fund before 1 October 2007: State total contributions by member to the fund, accumulated at 7% compound interest to the date of death.

R ,

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 ,

If the amount is from a Provident Fund, indicate total provident fund contributions by member **up to** 1 March 2016.

R ,

If the amount is from a Provident Fund, indicate total provident fund contributions **after** 1 March 2016.

R ,

Transfer from Pension Fund (after tax amount)

R ,

Directive number for pension transfer

Particulars of Gross Lump Sum Due (continued)

Was there a partial withdrawal amount taken from this benefit in the previous Fund? Yes No

If yes, state the particulars 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

Particulars of transfer

Did the fund pay any portion of lump sum payment into another fund? Yes No

Particulars of transfer (#1)

Transferee fund type: Retirement fund The amount transferred to the transferee fund R ,

Name of transferee fund

E-mail address of transferee fund

Tel no. of transferee fund

Cell no. of transferee fund

FSCA Registration no. of transferee fund **1 2 / 8 / 0 0 / 0 0 0 0 0 0**

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

Amount attributed to Post – 1 March 2021 Provident Fund value R ,

Particulars of transfer (#2)

Transferee fund type: Retirement fund The amount transferred to the transferee fund R ,

Name of transferee fund

E-mail address of transferee fund

Tel no. of transferee fund

Cell no. of transferee fund

FSCA Registration no. of transferee fund **1 2 / 8 / 0 0 / 0 0 0 0 0 0**

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

Amount attributed to Post – 1 March 2021 Provident Fund value R ,

Particulars of transfer #3

Transferee fund type: Retirement fund

The amount transferred to the transferee fund R ,

Name of transferee fund

E-mail address of transferee fund

Tel no. of transferee fund

Cell no. of transferee fund

FSCA Registration no. of transferee fund **1 2 / 8 / 0 0 / 0 0 0 0 0 0**

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

Amount attributed to Post – 1 March 2021 Provident Fund value R ,

Particulars of transfer #4

Transferee fund type: Retirement fund

The amount transferred to the transferee fund R ,

Name of transferee fund

E-mail address of transferee fund

Tel no. of transferee fund

Cell no. of transferee fund

FSCA Registration no. of transferee fund **1 2 / 8 / 0 0 / 0 0 0 0 0 0**

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

Amount attributed to Post – 1 March 2021 Provident Fund value R ,

Particulars of purchase of pension/annuity

Did the fund purchase an annuity? Yes No If yes, state the particulars per annuity purchase:

Pension/Annuity #1

Annuity policy number Amount utilised to purchase an annuity R ,

Indicate the type of annuity purchased:

Name of the registered long-term insurer where the annuity was purchased:

Email address of insurer

FSCA Registered Insurer no. Tel no. Cell no.

Death prior to retirement, the following fields are also mandatory for this purchase:

Surname

Name(s)

Identity Number Date of Birth (CCYYMMDD) Passport/Permit no.

Taxpayer reference no.

Pension/Annuity #2

Annuity policy number Amount utilised to purchase an annuity R ,

Indicate the type of annuity purchased:

Name of the registered long-term insurer where the annuity was purchased:

Email address of insurer

FSCA Registered Insurer no. Tel no. Cell no.

Death prior to retirement, the following fields are also mandatory for this purchase:

Surname

Name(s)

Identity Number Date of Birth (CCYYMMDD) Passport/Permit no.

Taxpayer reference no.

Particulars of purchase of pension/annuity (continued)

Pension/Annuity #3

Annuity policy number Amount utilised to purchase an annuity R ,

Name of the registered long-term insurer where the annuity was purchased:

Indicate the type of annuity purchased:

Email address of insurer

FSCA Registered Insurer no. 1 0 / 1 0 / 1 / Tel no. Cell no.

Death prior to retirement, the following fields are also mandatory for this purchase:

Surname

Name(s)

Identity Number Date of Birth (CCYYMMDD) Passport/Permit no.

Taxpayer reference no.

Pension/Annuity #4

Annuity policy number Amount utilised to purchase an annuity R ,

Indicate the type of annuity purchased:

Name of the registered long-term insurer where the annuity was purchased:

Email address of insurer

FSCA Registered Insurer no. 1 0 / 1 0 / 1 / Tel no. Cell no.

Death prior to retirement, the following fields are also mandatory for this purchase:

Surname

Name(s)

Identity Number Date of Birth (CCYYMMDD) Passport/Permit no.

Taxpayer reference no.

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

Is the fund paying the annuity? Yes No If yes, state the amount remaining in the fund to pay the annuity: R ,

