



How to complete this form – follow these steps

1. You can fill this form in electronically or you can print and sign it.
2. You must sign the form and date it.
3. Attach the documents requested above to the completed form.
4. Complete the Employer's declaration in the form and submit it directly to the contact person at Alexander Forbes.

Key points to understand about this form

If you do not complete all the information on this form, the payment of the benefit will be delayed. Please read this document carefully and contact us if you have any questions.



How to contact us

- If you want to ask us if we have the beneficiary's personal information, you can contact us at the telephone number shown at the top of the form.
- If the beneficiary's personal information is incorrect, we will change it if you make us aware of this.
- If you want a record of the personal information we have for the beneficiary, we might charge you a fee for this. Please contact us to find out what the fee is.

Section 1 | About the deceased member (the person who died)

Please fill in **all** the information in this section

Name(s)

Surname

Maiden name

Identity or passport number

Date of birth

Did the deceased member have a spouse*?

Yes No, If the deceased member had a spouse, please provide their spouse's ID number

*A spouse is the person the deceased member was married to under the laws of South Africa, according to the laws of their religion or in a customary union, or they were living with in a long-term relationship.

Residential address

Unit number

Complex name

Street number

Street or farm name

Suburb

City or town

Country

Code

Postal address

Code

Employment, financial and tax details

Employee number

Date of employment

Date member last actively at work

Date of death

Cause of death (if known)

Accidental Non-accidental

Annual salary on which death benefit is based

Income tax number

Revenue office

Divorce or maintenance court orders

Is there a divorce or maintenance court order issued that could affect the payment of fund benefits?

Yes No

If yes, please provide a certified copy of the court order.

Amounts owed to the employer

Amount to be deducted from the benefit and paid to the employer: R

Fill in this section if there is an amount to be deducted from the member's benefit and paid to the employer in terms of section 37D of the *Pension Funds Act*.

Debt includes:

1. Debt for a housing loan, if one of the following has occurred:

- The fund or the employer gave a housing loan to the member and the member owes money on the loan.
- The fund or the employer provided a guarantee for a housing loan for the member and the guarantee is enforced.

2. Debt arising from theft, dishonesty, fraud or misconduct. If the employer has experienced loss because of this, and one of the following has occurred:

- The member admitted responsibility (liability) in writing.
- There is a court judgment against the member.
- If the above applies, please attach a copy of:
 - the court order
 - the member's admission of liability

This is according to section 37D of the *Pension Funds Act*. Please speak to us if you need more information.

Section 2 | Employer to complete

Employer declaration

Please **read** and **sign** that you agree with the following:

1. You have deducted the contribution that was required until the date of the member's death, and you have paid the contribution to the fund.
2. The deceased member's details that you have provided to us are complete and accurate. We will accept the claim form as accurate unless you tell us about any changes within one business day of submitting the form. (Note that business days are Mondays to Fridays, excluding Saturdays, Sundays and official South African public holidays.)
3. If there is any loss as a result of incorrect information given, neither Alexander Forbes nor the fund is responsible for the losses.

Name and surname

Job title

Contact number

Sign here _____

Date



By signing here, you declare that you are duly authorised to do so.

Personal information, privacy and security

[Find out](#) how we protect your personal information, privacy and security