

Sanlam Employee Benefits

Instruction by a non-member spouse for payment of pension interest upon divorce

Notes:

- Retirement planning is very important and you are advised to seek independent financial advice when making financial decisions in order to provide for your retirement.
- Please note that an administration fee will be levied against your divorce benefit in respect of each fund that has to make payment.
- Where a lump sum benefit or a portion thereof is payable, a tax directive will be obtained from SARS. Payment can only be made once a tax directive has been obtained. In the event that a tax directive is declined for reasons beyond the control of Sanlam Employee Benefits, you will need to contact SARS directly to resolve the matter.
- Please attach a bank statement, stamped by the bank (not older than three months).

A. Member's personal particulars

Fund name

Title and initials

Full names and surname

ID nr / Passport nr

Date of birth

Contact number (home)

Contact number (cell)

E-mail address

Home address

Code

Postal address

Code

B. Non-member spouse's particulars

Title and initials

Full names and surname

ID nr / Passport nr

Date of birth

Tax number

Contact number

E-mail address

Home address

Code

Postal address

Code

Are you currently employed? Yes No If yes, specify annual income: R

Please select ONE of the payment options below:

1. **Pay full benefit in cash** (The benefit will be subject to tax)
2. **Transfer full benefit to a Pension Fund, Provident Fund, Retirement Annuity Fund or a Preservation Fund** (Please provide the application forms of the receiving fund separately)

Note: Transfers to an approved fund will be tax-free (except for a transfer from a pension fund to a provident fund).

| | |
|-----------------------|----------------------|
| Name of Approved Fund | Administrator |
| <input type="text"/> | <input type="text"/> |
| Contact number | e-mail address |
| <input type="text"/> | <input type="text"/> |

C. Banking details

| | | | |
|----------------------|----------------------|----------------------|----------------------|
| Name of bank | Account holder | Account number | Branch code |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Savings | Cheque | Transmission | |

Please note the following:

- ⓪ Payments cannot be made to credit card or bond accounts
- ⓪ Payments cannot be made to a third party
- ⓪ Payments cannot be split into different bank accounts

Signature of non-member spouse

Date