

Legacy Beneficiary Fund

Application for fund closure due to death of beneficiary

Notes:

- The application form is to be completed by the applicant
- The original application form and supporting documents must be posted/mailed to the administrator at Private Bag X14, Highveld Park, South Africa, 0169, or be delivered personally to 276 West Avenue, Centurion.
- Please take note there is a termination fee applicable on the closure of the Fund account.

SECTION A: Personal particulars of deceased beneficiary

Membership number:			
Date of birth:		Date of death:	
Full names and surname:			
ID number:		Passport number:	

SECTION B: Personal particulars of applicant

Title:		Date of birth:	
Full names and surname:			
ID number:			
Contact number(s):	Home:		Cell:
E-mail address:			
Home address:		Postal address:	

SECTION C: Banking details of estate late account

Bank:		Branch code:	
Account number:		Account type:	

SECTION D: Documents to be submitted with the application		Attached	
1	Original signed letter from applicant requesting closure due to death of beneficiary.	YES	NO
2	Original certified copy of Letter of Executorship (total value of estate >R250 000.00) from the Master of the High Court.	YES	NO
3	Original certified copy of Letter of Authority (total value of estate <R250 000.00) from the Master of the High Court.	YES	NO
4	Original bank statement of estate late account (not older than three months).	YES	NO
5	Original certified copy of the Identity Document or Smart ID card (include both sides).	YES	NO
6	Original certified copy of the death certificate of the beneficiary.	YES	NO

Signature of applicant

Date