

RETIREMENT NOTIFICATION



Alexander Forbes

Alexander Forbes Administration Services,
 a division of Alexander Forbes Financial Services (Pty) Ltd.
 Reg No. 1969/018487/07
 FAS Licence no: 1177
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Name of Retirement Scheme:
Name of Employer/Paypoint:

MEMBER'S PARTICULARS (please complete in full)

Surname

First names

Maiden name

ID/Passport number Date of birth

Residential address
 Unit number Complex
 Street number Street/Farm name
 Suburb City/Town
 Country Code

Postal address

Telephone numbers
 Home Work
 Cell E-mail

Employee number Date of employment

Date of retirement Date of last contribution

Annual taxable salary at date of retirement R

Period of employment outside RSA prior to retirement Completed years From to

Income tax number Revenue office

Do you have a spouse? Yes No Refer to Rules of Fund/member booklet for definition of spouse.

Spouse's ID number (if Yes)

Non-completion of the above may result in a delay in the settlement of this claim.

TYPE OF RETIREMENT (tick appropriate box) (✓)

Normal Voluntary early Ill health At employer request Late

SALARY DATA FOR DEFINED BENEFIT PENSION FUNDS ONLY (Required to calculate the Final Pensionable Salary in terms of the Rules)

Date from	Date to	No. of weeks/months	Salary pensionable (Rand only)	Total (Rand only)
<input type="text"/>	<input type="text"/>	<input type="text"/>	R <input type="text"/>	R <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	R <input type="text"/>	R <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	R <input type="text"/>	R <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	R <input type="text"/>	R <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	R <input type="text"/>	R <input type="text"/>
Total				R <input type="text"/>

INDEBTEDNESS TO EMPLOYER TO BE RECOVERED FROM BENEFITS (DEDUCTIONS AS PER SECTION 37D OF THE PENSION FUNDS ACT)

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Section 37D of the Pension Funds Act

The section provides two instances when a fund may deduct amounts from a member's benefit. These are:

- When the member owes the fund or his employer money for an outstanding housing loan given by the fund or the employer or where the fund or employer provided a guarantee for a housing loan taken by the member and the guarantee is enforced.
- In the event of an employer suffering loss due to an employee's theft, dishonesty, fraud or misconduct, where the employee has admitted liability in writing or a court judgement has been obtained. **In such instances, a copy of the court order must be attached.**

DOCUMENTATION TO BE ATTACHED (CERTIFIED COPIES REQUIRED):

Member's proof of age Required for all Retirement Notifications submitted.

The following is only required for pension funds or where an annuity is to be purchased from an insurance company on a provident fund:

Member's marriage certificate Proof of age for spouse Proof of age for dependent children Completed Release of Obligation

Medical aid deduction Yes No Name of medical aid _____

