

Member decision on exiting from a retirement fund

By law, the Fund is not able to pay your benefit due to you from the fund, until you have made a decision and inform them of your decision.

At this point, you only need to decide between preserving your savings and taking some/all in cash.

Your Human Resources department will ask you to complete a form where you need to provide further information on your decision.

My decision

I, _____ (name) herewith confirm that I am withdrawing from my retirement fund and that I have chosen the following option for the payment of my benefit due to me from the fund: (select one option)

- Preserve the full benefit
- Transfer the full benefit to another fund
- Receive a portion of the benefit in cash and to transfer a portion
- Receive the full benefit in cash

I also confirm that I have been informed of the option to speak with a counsellor who can explain the various options available to me. It has been explained to me that the counsellors are not financial advisors, and that any information provided to me by the counsellors does not constitute advice. I accordingly understand that if I want advice, I should consult an accredited financial advisor. I have been made aware that counselling services are available to assist in my decision.

Member signature: _____

Date: _____

ID number: _____

Contact number: _____

Employer name: _____

Disclaimer

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx>; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: SCClientCare@sanlam.co.za or call: 086 122 3646