

Alexforbes One

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Retirement claim form



Why do I need to complete this form?

Because you are retiring from your employer, you need to tell Alexforbes what to do with your retirement benefits. It is important that you understand your options and make the right decision for you and your financial wellbeing.

Name of fund

Name of employer / paypoint



What are my options?

1 Defer your retirement from the fund and keep your benefits where they are

- Your money will stay invested in the same/similar portfolios

Download - Deferring in the fund brochure

Important: If you received advice from a financial adviser on this option, please tick this box and **click here** to complete this one-page form.

Yes my financial adviser assisted me in choosing this option.

How does this benefit me?

- It is the easiest process.
- You can change your decision or investment option later.

2 Transfer

- Move your money into an annuity to receive a retirement income.
Or
- Move your money to another fund.

How does this benefit me?

- Your transfer amount will be invested in a fund of your choice.
- You can add any other retirement benefits you have to keep them all in one place.

3 Withdraw all your retirement benefit

- Take your retirement benefits in cash.
- This is only applicable if 2/3 of your total benefit in the non-vested portion, plus the total amount in the retirement pot, does not exceed R165 000.



Important:

Before you make any decision regarding your retirement benefit, it is important that you understand the options applicable to the vested, savings and retirement pots which make up your full benefit.

You can view the values of your different pots through the following options:

AF Connect: Visit <https://online.alexforbes.com/home>

Benefit Statement: Refer to your latest benefit statement

Quotation Request: Request a quotation from the fund

Financial Adviser: Discuss the details with your financial adviser

If you are transferring to a retirement annuity, or a preservation fund, you must transfer your full benefit without doing a partial cash withdrawal.

Any 37D deductions (for example a divorce order, maintenance order, employer debt, and so on) will be deducted proportionately from the vested pot, savings pot and retirement pot.



Required document checklist.

Please confirm you have provided the following documents. Your application will only be processed once all required documents are received.

A copy of your identity document or passport.

Pending and active divorce or maintenance court orders (if applicable).

One of the following

Bank letter with account details (recent within 3 months)

Latest bank statement (recent within 3 months).

- I received help from a qualified professional when I completed this form and understand the various options that I may choose from and the implications of these options.
- I elected not to receive help from a qualified professional

If you do not have a financial adviser and find that you need assistance in making the most appropriate decisions about your upcoming retirement, please reach out to Alexforbes by selecting one of the options below:

Telephone: 0860 100 444 | **Email:** iac@alexforbes.com

If you want us to call you back [Click here](https://kfta.app.alexanderforbes.co.za/TotalAgility/Forms/Digital/Contact_Us.form) (https://kfta.app.alexanderforbes.co.za/TotalAgility/Forms/Digital/Contact_Us.form).

We also encourage you to visit the My Money Matters website to get more information on the options available to you. [Click here](https://mymoneymatters.alexforbes.com/) (https://mymoneymatters.alexforbes.com/).

Section 1 | About you (the member)

Fill in the details below

Your name(s)

Your surname

Identity or passport number

Date of birth



The details you include in the above section must be **accurate**. Your name, surname and ID or passport number must match your identity document. Alexforbes checks this information with the Department of Home Affairs and any errors or discrepancies may delay the processing and payment of your claim.

Residential address

Unit number

Complex name

Street number

Street or farm name

Suburb

City or town

Country

Code

Postal address (Tick yes if your postal address is the same as residential address)

Yes

Code

Contact details

Please give us your **personal** (not professional) contact details.

Cell

Home

Work

Email

Tax details

Income tax number

Country of residence for tax purposes*



Note: *Please [click here](#) to complete a **Withholding tax on interest (WTI)** form if your country of residence for tax purposes is not South Africa.

Financial adviser's details

Financial adviser's name

Financial adviser's FSP number

Financial adviser's contact details

Cell

Work

Email

Section 3 | Your declaration (the member)

Please read and sign that you agree with the following:

1. I understand my options and the tax implications.
2. I'm responsible for any loss suffered if I provide incorrect information.
3. I made my own decision or got financial advice.
4. My claim will be processed in line with the fund rules.
5. If applicable, any permissible deductions in terms of section 37D of the Pension Funds Act, will be applied to my benefit.
6. Once I have submitted my claim form, I cannot change it.
7. My decision will be shared with my employer for record keeping.
8. If I provide you with an instruction that is not legally binding, my instruction will not be actioned and the form will be rendered null and void:
9. All information provided by me in this form is true and accurate.

Full name

Sign here _____

Date

D	D	M	M	Y	Y	Y	Y
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Personal information, privacy and security

Find out how we protect your personal information, privacy and security. (<https://invest.alexforbes.com/za/en/global/popia-clause>)

Section 4 | Employer to complete

Date of employee leaving

D	D	M	M	Y	Y	Y	Y
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 Member's employee number

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Type of retirement:

Normal Voluntary early Ill-health At employer's request Late

Amounts owed to the employer

* Below are the **ONLY** debts that the employer may claim in terms of section 37D of the Pension Funds Act.

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

- The fund gave a housing loan to the member and the member owes money on the loan.
- The fund 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

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*. *

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

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 or Not applicable



Note: Please [click here](#) to download an indebtedness form if there is an amount to be deducted. Please return the indebtedness form with the claim form.

Employer declaration

Please read and sign that you agree with the following:

1. The member has left or is leaving our employment.
2. The correct contribution was deducted and paid to the fund up to the member's leaving date.
3. If there is any loss suffered as a result of us providing you with incorrect information, neither Alexforbes nor the fund is responsible for the losses.
4. We have given the member a copy of this form with their available options.
5. If the member has not signed or completed this form, you have signed this page and the member's fund benefit will be preserved in the fund as a deferred retirement.
6. If we provide us with an instruction that is not legally binding, we will not be able to action such instruction, the form will be rendered null and void and you have informed the member.

Name and surname

Job title

Sign here _____

Date

D	D	M	M	Y	Y	Y	Y
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By signing here, I declare that I am duly authorised to do so.

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