

## Death benefit claim form

**The purpose of this form is to inform a fund of the death of an In-Fund member so that the fund can process the death benefit.**

In this form:

- 'You' refers to the deceased member's spouse, beneficiary or executor.
- 'The deceased' refers to the person named on this form as the member.
- 'We' and 'us' refer to the administrator of the fund.
- 'Fund' refers to the fund that the deceased was a member of.

### Key points to understand about this form and payment process

Please read this document carefully. Contact a financial adviser or us if you have any questions. You should sign the form only if you agree to all the terms and conditions in it. You must make sure that all the information is correct and that all parts of the form are complete. We have the right to treat the information given in the form as accurate and complete. If you make changes to what you have already filled in, you must sign next to each change.

### Follow these steps

1. You need to fill in the form. You do have the option of filling in this form electronically and printing the electronic version of the form to be signed.
2. You must sign the form and date it.
3. Attach the documents requested below to the completed form.
4. Keep a copy of the form to refer to for any queries.
5. Email the form to us or deliver it to the address shown at the top of the form.

### About claiming a death benefit

It is important to understand that any delay in submitting the documentation required to process a death claim will result in delays of payment to all beneficiaries.

- **Time you have to notify us of the death: three months**

Alexforbes must be notified of the death of a member within three months of the death of the member.

- **Submit all your documents as soon as possible:**

The trustee's have up to 12 months (from the date on which the fund is advised of the members death) to distribute the death benefit based on the level of financial dependency of each potential beneficiary. Payment can only be made once we have received all the required documents, including a tax directive from SARS. Sometimes there may be delays because of outstanding tax directives. We will process your benefit according to the fund's rules.

- **When is a death benefit transferred to an unclaimed benefit fund?**

If the fund has still not paid out the benefit or part of it to a beneficiary within 24 months after the trustee disposal resolution has been signed, the amount will become an 'unclaimed benefit' and may be transferred to an unclaimed benefit fund.

**If you do not complete all the information on this form, the payment of the benefit will be delayed.**

### Documents required to process a death benefit

You must attach copies of the following documents to this form. If any information is not yet available, you can send it to us as soon as you have it (keeping in mind that any delay could delay the trustee investigation).

- Member's proof of age
- Member's death certificate (certified copy)
- If the member was married:
  - Member's marriage certificate or a letter from the tribal authority confirming customary marriage
  - Proof of age for spouse\*
  - Proof of age of dependent children (if applicable)
  - Proof of banking (not older than 3 months).
- If there is any divorce or maintenance court order that affects the payment of fund benefits:
  - Copy of the court order
- The additional form with the information needed to determine the distribution of a lump-sum death benefit. This form needs to be submitted as soon as possible. If the completed form is not available, it should be submitted later.

*\*A spouse is the person who the member was married to under the laws of South Africa, according to the laws of their religion or in a customary union, or who the member was living with in a long-term relationship as at date of death.*

Please submit this claim form and all required documents as soon as possible. We are only able to process the claim once the trustee investigation has been finalised. The investigation can only be finalised once all the required information has been received.

## Delays in carrying out your instructions

### Personal information, privacy and security

If you want a record of the personal information we have for the deceased, we might charge you a fee for this. Please contact us to find out what the fee is.

**TO FIND** out how we protect your personal information, privacy and security.

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#### How to contact us

- If you have any questions or require more information, or would like to check that the personal information of the deceased information is accurate, please contact us on the telephone number at the top of the form or by email on [Udeathclaims@alexforbes.com](mailto:Udeathclaims@alexforbes.com)

#### Complaints

- We would like to hear from you if you have a complaint.
  - You can do so in person at any of our offices, by email at [contactus@alexforbes.com](mailto:contactus@alexforbes.com), by phone on 0860 000 279 or +27 (0)11 669 7026 if you are outside South Africa, or by following our complaints process on the website at <http://www.alexforbes.com/za/en/contactus/complaints.aspx>.
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## Death benefit claim form

Name of fund

Membership number

### About the member

Please fill in all the deceaseds' information in this section.

#### Personal details

Surname

First names

Maiden name

Previous surname

Title:  Prof  Dr  Mr  Mrs  Ms  Other (specify)

ID number

Date of birth

Passport number

Country of issue

Date of expiry

Did the deceased member have a spouse\*?  Yes  No

If the deceased member had a spouse, what is their spouse's identity number?

\*A spouse is the person the deceased member was married to under the laws of South Africa, according to the laws of their religion or in a customary union, or they were living with in a long-term relationship as at date of death.

#### Death and tax details

Date of death

Cause of death (if known)

 Accidental Non-accidental Natural

Income tax number

Revenue office

#### Divorce or maintenance court orders

Is there a divorce or maintenance court order issued that could affect the payment of fund benefits?

 Yes No

If yes, please provide a certified copy of the court order.



