



**RECOGNITION OF TRANSFER BETWEEN
APPROVED FUNDS**



GENERAL

In terms of the Income Tax Act (Act 58 of 1962) lump sum benefits at withdrawal / resignation / liquidation are exempted from lump sum tax

- if they arise from an approved pension fund and are transferred to another approved pension fund / retirement annuity fund;

or

- if they arise from an approved provident fund and are transferred to another approved pension fund / provident fund / Retirement annuity fund.

PARTICULARS OF MEMBER

Full first names and surname												
Gender		Date of Birth	y	y	y	y	m	m	d	d	Identity Number	
Income tax reference no.										Income tax office		

STATEMENT ON BEHALF OF TRANSFERRING FUND

I, the undersigned, declare on behalf of the

FSB number		SARS number	
1. That the transferring fund is an approved pension / provident fund (delete which is not applicable), and			
2. That the member enjoyed membership of the transferor fund until			
Signed at		on this	
		day of	
			2 0
			Fund
Signature		P.O. Box 359, Saxonwold, 2132	

STATEMENT ON BEHALF OF RECEIVING FUND

I, the undersigned, declare on behalf of the

FSB number		SARS number	
1. That the receiving fund is an approved pension / provident / retirement annuity fund and			
2. That R			
		has been received for application under the receiving fund on behalf of the member, and	
3. That the transfer was in accordance with the stipulations of the Act as defined in part 1 above			
Signed at		on this	
		day of	
			2 0
Signature		Stamp	

