



DEATH NOTIFICATION



This form is to be completed by the deceased Member's Employer and submitted together with:

- In respect of the deceased Member:

- Documentation pertaining to a housing loan or a housing loan guarantee in respect of which the deceased Member's benefits are pledged
- Expression of Wish form previously completed by the deceased Member
- Certified copy of the original death certificate
- Certified copy of the original birth certificate / identity document / other proof of age
- Certified copy of the original marriage certificate / customary union (if applicable)

- In respect of the beneficiaries to whom benefits are to accrue:

- Certified copy of the original birth certificate / identity document / other proof of age
- Personal particulars revenue form IRP2

If the spaces provided on this form are insufficient then additional information, which is to be signed by the Employer, may be attached to this form.

Name of Fund	
Name of Employer	
Employer's tax number	

PARTICULARS OF DECEASED MEMBER									
Full name								Gender	
Fund membership or Company number (if applicable)									
Date of birth							Identity Number		
Date of death									
Income tax reference no. (if applicable)					Office (if applicable)				
Fund membership or Company number of deceased (if applicable)									
Date employed					Occupation at date of death				
Date last actively in the service of the Employer									
If the deceased Member was absent from duty with or without remuneration or with reduced remuneration at date of death. Please provide full particulars									



Annual Fund Salary at date of death	R		p.a.
One year prior to death (if applicable)	R		p.a.
Member contributions (if applicable) deducted from the deceased's salary or wages for the 3 months immediately preceding death:			
Month 1		Contribution	R
Month 2		Contribution	R
Month 3		Contribution	R
Should the Employer be aware of any other lump sum benefits which will accrue or have accrued in respect of the deceased Member from any other fund please provide particulars			

PARTICULARS OF DECEASED MEMBER'S DEPENDANTS

Please list Dependants from the deceased Member's Expression of Wish form, adding / deleting any changes which may have occurred subsequent to its completion:

Full name	1		2	
Date of birth				
Relationship to deceased				
% degree of dependency			%	
Full name	3		4	
Date of birth				
Relationship to deceased				
% degree of dependency			%	
Please provide details of any other factors which may influence the Trustees' decision				

PARTICULARS OF DECEASED MEMBER'S NOMINATED BENEFICIARIES

Please list Nominated Beneficiaries from the deceased Member's Expression of Wish form:

Full name	1		2	
Date of birth				
Relationship to deceased				
% of benefit payable			%	



Full name	3		4	
Date of birth				
Relationship to deceased				
% of benefit payable			%	
Please provide details of any other factors which may influence the Trustees' decision				

PARTICULARS OF DECEASED MEMBER'S ESTATE	
Name of Executor / Executrix of the Estate	
Address	
Telephone number	

LUMP SUM BENEFIT - RECOMMENDATION TO TRUSTEES		
Only to be completed if the Fund makes provision for lump sum death benefits. The lump sum after taxation is to accrue and be paid to the following Dependants / Nominated Beneficiaries:		
Name of beneficiary	% portion of lump sum benefit	How payable (please specify lump sum or monthly income)
		%
		%
		%
		%

Should the recommendation above be the payment of a monthly income please give the following particulars (please note that benefits may not be paid directly to minors): NB: Please note that in terms of the Pension Funds Amendment Act 1996, the beneficiary must agree to this in writing

Name of beneficiary	
Name of bank / building society	
Branch name	Branch code (banks only and comprising 6 digits)
Account number	
Name of beneficiary	
Name of bank / building society	
Branch name	Branch code (banks only and comprising 6 digits)
Account number	



Please provide details of any other factors which may influence the Trustees' decision

SPOUSES' AND / OR CHILDREN'S PENSIONS

Only to be completed if the Fund makes provision for spouses and / or children's death in service pensions. Pensions are paid into the beneficiary's bank / building society account (please note that pensions may not be paid directly to minors):

Name of beneficiary							
Name of bank / building society							
Branch name				Branch code (banks only and comprising 6 digits)			
Account number							
Name of beneficiary							
Name of bank / building society							
Branch name				Branch code (banks only and comprising 6 digits)			
Account number							

EMPLOYER'S DECLARATION

I, the undersigned
in my capacity as _____ (designation)
of the _____ (name of Employer)

hereby declare that:

- The deceased Member was in our service at the date of his / her death
- To the best of my knowledge and belief the particulars reflected on this form are true and correct.

Signed at _____ this _____ day of _____ 2 0 _____

Signature _____



NOTES FOR THE EMPLOYER AND TRUSTEES ON THE DISPOSITION OF DEATH BENEFITS

- DEPENDANTS of the deceased Member include the deceased Member's spouse, children and any other person who was financially dependent on the deceased Member for maintenance.
- NOMINATED BENEFICIARIES of the deceased Member are persons who are not classified as DEPENDANTS and whom the deceased Member had nominated in writing to the Fund after 30 June 1989 to receive benefits.
- If the deceased Member leaves DEPENDANTS or if the deceased Member leaves DEPENDANTS and NOMINATED BENEFICIARIES then the distribution of the benefits is at the discretion of the Trustees, who will have due regard to the principle of fairness and the Member's wishes as recorded on the Expression of Wish form.
- If the deceased Member does not leave DEPENDANTS, the lump sum benefit, after payment of the net debts in the deceased Member's Estate, will be paid to the NOMINATED BENEFICIARIES of the deceased Member as specified by the Member and the balance, if any, will be paid to the deceased Member's Estate.
- If deceased member did not notify the Trustees of any DEPENDANTS and NOMINATED BENEFICIARIES and the Trustees are unable to ascertain the existence of any DEPENDANTS within 12 months following the deceased Member's date of death then the benefit will be paid to the deceased Member's Estate.
- The deceased Member's wishes as recorded on the Expression of Wish form do not in any way confer a right or entitlement upon the persons mentioned in the form. The decision regarding the disposal of the benefits vests solely in the Trustees unless the deceased member is survived only by NOMINATED BENEFICIARIES.
- Payment of the benefit will not be directed to the deceased Member's Estate unless specified otherwise above.

