



## Section 1 | About you (the member)

### Fill in the details below.

Your name(s)

Your surname

Identity or passport number

Date of birth

### Residential address

Unit number

Complex name

Street number

Street or farm name

Suburb

City or town

Country

Code

### Postal address (it differs from residential address)

Code

### Contact details

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

Cell

Home

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.

## Section 2 | Transfer

### Move your money to another fund.

Will you be transferring all of your savings, or some of your savings? Please **tick one** of the options:

■ Transfer **all** my savings

Or

■ Transfer **some** of my savings; I wish to withdraw some of my savings\*

Please fill in your fund and adviser details below for us to transfer your money correctly.

New fund name

### Contact details of financial adviser or fund administrator

Name

Email

Cell

Work

### If you would like to withdraw **some** of your savings, please fill in the details below.

*Do not complete if you are transferring all of your savings.*

**Pension Fund:** The total cash portion must not be more than 33.33% of your total retirement savings.

**Provident fund:** The total cash portion must not be more than your accumulated savings before 1 March 2021 plus 33.33% of your accumulated savings after 1 March 2021.

How much would you like to withdraw? R  .  **OR**  .  % **OR**  Maximum cash portion (mark with ✓)



**Note:** Your cash portion may be taxed. For guidance on this, please visit the SARS website on [www.sars.gov.za](http://www.sars.gov.za).

### Fill in the details below.

Please give us your own personal bank details and not someone else's.

Account holder's name

Name of bank

Account number

Branch code

Cheque or

Savings



