

Sanlam Corporate

Instruction by a non-member spouse for payment of pension interest upon divorce

Notes:

- Retirement planning is very important and you are advised to seek independent financial advice when making financial decisions in order to provide for your retirement.
- Please note that an administration fee will be levied against your divorce benefit in respect of each fund that has to make payment.
- Where a lump sum benefit or a portion thereof is payable, a tax directive will be obtained from SARS. Payment can only be made once a tax directive has been obtained. In the event that a tax directive is declined for reasons beyond the control of Sanlam Corporate, you will need to contact SARS directly to resolve the matter.
- Please attach a bank statement, stamped by the bank (not older than three months).

A. Member's personal particulars

Fund name

Title and initials

Full names and surname

ID nr / Passport nr

Date of birth

Contact number (home)

Contact number (cell)

E-mail address

Home address

Code

Postal address

Code

B. Non-member spouse's particulars

Title and initials

Full names and surname

ID nr / Passport nr

Date of birth

Tax number

Contact number

E-mail address

Home address

Code

Postal address

Code

Are you currently employed? Yes No If yes, specify annual income: R

PLEASE NOTE: If you have been employed and registered for tax purposes before, please ensure to provide your tax reference number. Payment can only be made once a tax directive has been obtained from SARS. Should you indicate no tax reference number but you are registered, our tax application will be

declined and this will delay the payment. If unsure about your tax reference number, kindly contact the SARS Contact Centre.

Please select **ONE** of the payment options below:

1. **Pay full benefit in cash** (The benefit will be subject to tax)
2. **Transfer full benefit to a Pension Fund, Provident Fund, Retirement Annuity Fund or a Preservation Fund** (Please provide the application forms of the receiving fund separately)

Note: Transfers to an approved fund will be tax-free (except for a transfer from a pension fund to a provident fund).

Name of Approved Fund	Administrator
Contact number	e-mail address

C. Banking details

Name of bank	Account holder	Account number	Branch code
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Savings Cheque Transmission

Please note the following:

- ⓪ Payments cannot be made to credit card or bond accounts
- ⓪ Payments cannot be made to a third party
- ⓪ Payments cannot be split into different bank accounts

Signature of non-member spouse

Date

Disclaimer

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx>; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: SCClientCare@sanlam.co.za or call: 086 122 3646.