



Spouse Life Insurance: Application for benefit

Name of Policyholder: _____ Code _____

Name of participating employer or branch _____

Important Notes This form is to be completed when:

- the insurance of a spouse/life partner/customary marriage commences in terms of the policy,
- a life partner in a co-habiting relationship is nominated to qualify for insurance; and
- a change in the information regarding the spouse/life partner as indicated in *Section B*, becomes applicable.

All references to insured will mean either employee or fund member.

In the event of the death of the spouse/life partner/customary marriage, a copy of this form must accompany the death claim documents submitted to Sanlam.

A Particulars of insured *(Compulsory to be completed by the employer)*

Full names and surname: _____

Identity number: _____

Date of birth: _____ (dd/mm/ccyy) Gender: Male Female

Marital status: Married Co-habiting Customary marriage

Employee number: _____ Date of entering service: _____

Date of permanent appointment: _____ Commencement date of insurance: _____

Certified on behalf of the employer that the above information is correct

Full names and surname: _____

Signature _____ Capacity: _____

Date: _____ (dd/mm/ccyy)

B Particulars of spouse/life partner and marriage/customary marriage

Full names and surname _____

Identity number: _____

Date of birth: _____ (dd/mm/ccyy) Gender: Male Female

Please note:

- It is compulsory for qualifying spouses of existing employees and new employees to join the group scheme.
- All spouses in living together arrangements (i.e. co-habiting spouses) must provide medical evidence of good health in respect of their full cover amount, before their insurance commences.
- If a person is in a *co-habiting relationship*, the partner can only be nominated if neither one of the couple living together, is married to another person.

Marital status: Married (civil) Customary marriage (Tribal / Labola / Hindu)

Date of entering into marriage: _____ (dd/mm/ccyy)

Co-habiting Life partnership

Date of registration of the union with the employer: _____ (dd/mm/ccyy)

Definitions:

Qualifying Spouse means the person with whom the employee is joined in **Marriage**, provided that such person, at the time of qualifying for the insurance, has already reached the age of 15 years. If an employee is joined in **Marriage** with two or more persons, **Qualifying Spouse** means:

- only that one of them whom the employee nominated in writing to the employer during the person's life; or
- if the employer advises Sanlam that the employee has failed to nominate only one of them in terms of paragraph (a), only the one with whom he/she is joined in **Marriage** first.

Once a nomination has been made in terms of paragraph (a), it remains in force as long as the employee is joined in marriage with the relevant spouse.

A **Qualifying Spouse** who is joined in a union referred to in paragraph (b) of the definition of **Marriage** must in terms of the clause submit proof of good health to the satisfaction of Sanlam to qualify for the spouse's life insurance.

Marriage means:

- a) a marriage or union in accordance with the Marriage Act, 1961, the Recognition of Customary Marriages Act, 1998, or the Civil Union Act, 2006, or the tenets of a religion; or
- b) a union where two persons are living together as if married, with the commitment of continuing to do so permanently provided that
 - they have been doing so for at least six months; and
 - in the format prescribed by the **Employer** from time to time, they successfully applied in writing to the employer, before the death of any one of them, for their union to be registered by the employer; and
 - one or both of them are not joined in a marriage or union as contemplated in paragraph (a) above with another person.

C Disclaimers

Party Due Diligence requirements

In line with the FIC Amendment Act, 2017 and other Party Due Diligence requirements, Sanlam has the obligation to identify and verify all persons or entities we interact with. Thus, please provide the information as requested in the forms. Sanlam reserves the right to cancel the insurance immediately if any of the obligations in terms of the FIC Amendment Act, 2017 and other Party Due Diligence requirements are not met.

Protection of Personal information

Why Personal Information is required: Sanlam Life Insurance Limited ("Sanlam Life"), a subsidiary of Sanlam Limited, will process and protect your personal information as required by relevant laws and the Constitution of the Republic of South Africa ("RSA"). The personal information requested in this form, which may include special personal information is being collected and will be processed for the following purposes:

- underwriting and providing accurate and effective insurance cover and related value-added services;
- member communication;
- market research and statistical analysis;
- verification of the personal information provided;
- to comply with all legal and regulatory requirements, including applicable codes of conduct;
- to protect Sanlam Life's interests; and
- any purposes related to the above.

Failure to provide the mandatory information will prejudice your insurance cover.

Changing and correcting Personal Information: You have the right to:

- Request a copy of your personal information as processed by Sanlam Life;
- Ask for an update and/or correction of your personal information;
- Lodge a complaint with the Information Regulator.

Sanlam Life may charge an administrative fee subject to prior notice of any such cost before executing the request for a copy of your personal information.

Other parties that may receive the Personal Information:

- We may share your personal information within Sanlam Limited and/or with other service providers where required for any of the purposes listed above, or with third parties where Sanlam Life is lawfully required to do so.
- We may send your personal information to service providers outside the RSA for storage or further processing on Sanlam Life's behalf. We will however not send your information to a country that does not have information protection legislation similar to that of the RSA, unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of personal information in accordance with the Protection of Personal Information Act, 2013.

For more information, please refer to the [Sanlam Group Privacy Notice](#).

Declaration by the insured

I declare that when claiming a benefit for my spouse/life partner, I will be responsible to render proof of my relationship.

Signature of employee _____ Date _____ (dd/mm/ccyy)

Signature of witness _____ Date _____ (dd/mm/ccyy)