

Legacy Beneficiary Fund

Application for fund closure due to death of beneficiary

Notes:

- The application form is to be completed by the applicant
- The original application form and supporting documents must be posted/mailed to the administrator at Private Bag X14, Highveld Park, South Africa, 0169, or be delivered personally to 276 West Avenue, Centurion.
- Please take note there is a termination fee applicable on the closure of the Fund account.

SECTION A: Personal particulars of deceased beneficiary

Membership number:			
Date of birth:		Date of death:	
Full names and surname:			
ID number:		Passport number:	

SECTION B: Personal particulars of applicant

Title:		Date of birth:	
Full names and surname:			
ID number:			
Contact number(s):	Home:		Cell:
E-mail address:			
Home address:		Postal address:	

SECTION C: Banking details of estate late account

Bank:		Branch code:	
Account number:		Account type:	

SECTION D: Documents to be submitted with the application		Attached	
1	Original signed letter from applicant requesting closure due to death of beneficiary.	YES	NO
2	Original certified copy of Letter of Executorship (total value of estate >R250 000.00) from the Master of the High Court.	YES	NO
3	Original certified copy of Letter of Authority (total value of estate <R250 000.00) from the Master of the High Court.	YES	NO
4	Original bank statement of estate late account - not older than three months.	YES	NO
5	Original certified copy of the Identity Document or Smart ID card (include both sides) of applicant.	YES	NO
6	Original certified copy of death certificate of the beneficiary.	YES	NO

Signature of applicant

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.