

Legacy Beneficiary Fund

Change of contact/banking details form

Please select one of the following options:

I am a guardian wishing to change my contact/banking details.	
I am a major beneficiary (18 years and older) wishing to change my contact/banking details.	
I am a minor beneficiary (younger than 18 years) wishing to change my contact details.	
I am a major beneficiary (18 years and older) requesting payment to be made directly to myself and provide herewith my banking details.	

SECTION A: Contact details of beneficiary/guardian

Title, full names and surname:			
ID number:		Member number:	
Contact number(s):	Home:	Cell:	
E-mail address:			
Home Address:		Postal Address:	

SECTION B: Banking details

Name of account holder:		Name of bank:	
Account number:		Branch code:	
Account type:	Savings	Cheque	Current
Transmission			
Please note the following:			
<ul style="list-style-type: none"> - Payments cannot be made to credit card or bond accounts. - Payments cannot be made to a third party. - Payments cannot be split into different bank accounts. 			

SECTION C: Documents to be submitted with the application		Attached	
1.	In the case of a guardian or a major beneficiary : An original certified copy of the Identity Document or Smart ID card (include both sides).	YES	NO
2.	In the case of a minor beneficiary : An original certified copy of the Identity Document, Smart ID card (include both sides) or the birth certificate.	YES	NO
3.	A bank statement (not older than three months) or a bank mandate (not required for minor beneficiaries).	YES	NO

SECTION D: Declaration

Declaration by the guardian/beneficiary

I, the undersigned guardian/beneficiary, hereby confirm that:

- The information given herein is true and correct.
- I am the account holder on the above-mentioned bank account.
- I instruct and authorise Sanlam to pay all monies due to me in accordance with my instructions above.

Signature of Guardian/Beneficiary

Date

Please e-mail the completed documentation to: ibf@sanlam.co.za or fax it to **086 676 1892**

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.