

Sanlam Umbrella Fund

Member beneficiary nomination form in respect of Fund and group life scheme death benefits

Important information when completing this form:

This nomination applies to both death benefits payable by the Sanlam Umbrella Fund (approved benefits) and any benefits provided through the separate group life scheme (unapproved benefits), if these are applicable. The Pension Funds Act stipulates that the Trustees have the duty to allocate your Fund death benefits fairly. The nomination you make here will be taken into account during this allocation. Group life scheme benefits, on the other hand, will be paid in accordance with your nomination and the Trustees have no discretion in this regard.

Should you wish to make separate nominations in respect of your Fund death benefits (approved benefits) and your group life scheme death benefits (unapproved benefits), **please complete two separate forms** and indicate each clearly in Section D.

SECTION A: Member's Personal Particulars			
Fund Name:			
Participating Employer:			
Title and Initials:		Date of Birth:	
Full Names and Surname:			
Member Number:		ID Nr / Passport Nr :	
Income Tax Number:			
Contact Number(s):	Home:		Cell:
E-mail address:			
Home Address:		Postal Address:	

The difference between a beneficiary and a dependant

There is a difference between a beneficiary and a dependant and that is why we need you to complete both Section B and Section C.

What is a beneficiary?

You may nominate, in writing, any natural person(s) to receive your death benefits. Such a **beneficiary** can include a dependant or any other person (even if they do not necessarily depend on you financially).

What is a dependant?

The Pension Funds Act defines a **dependant** as being:

- ⓪ Any person for whom you are legally responsible for maintenance.
- ⓪ Any person for whom you were not legally responsible for maintenance, but was, in the opinion of the Board, in fact dependent on you for maintenance at the time of your death.
- ⓪ Your spouse, including a party to a customary or civil union.
- ⓪ Your children, including a child born after your death, an adopted child and an illegitimate child.
- ⓪ Any person for whom you would have been legally responsible for maintenance if you had not died.

SECTION B: Nomination of beneficiaries for death benefits**Select ONE of the following options:**

- | | |
|---|--------------------------|
| 1. This nomination applies to both my approved and unapproved death benefits. | <input type="checkbox"/> |
| 2. This nomination applies to my approved death benefits. | <input type="checkbox"/> |
| 3. This nomination applies to my unapproved death benefits | <input type="checkbox"/> |

If you wish to make two different nominations, you need to complete two forms and mark them clearly.

Name and Surname	ID number	Tax number	Relationship	Cell number	% of benefit

Total % allocation (must add up to 100%):	100%
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Motivation (Optional): *In most cases the Trustees will not have any knowledge of your personal circumstances. The Trustees, therefore, have to rely on the information provided in this form. The Trustees suggest that you add additional information or documents to this form, providing reasons why you wish to allocate the benefits in the manner you have decided, or to provide any additional information that you believe will assist the Trustees. /These notes will place the Trustees in a more informed position to make a final decision on the distribution of your benefits, and assist them in allocating your benefits in accordance with the Pension Funds Act, whilst taking your wishes into account.*

SECTION C: Nomination for Funeral Benefit (If applicable)

I hereby request the Fund, in the event of my death, to pay the amount which may become payable by the Fund as a result of my death, or such a portion thereof as is specified to the person(s) mentioned below

Name and Surname	ID number	Relationship	Cell number	Nature of financial support *

Special relationships or other information that I would like the Trustees to know about:

