

DISPOSAL OF DEATH BENEFITS

MEMBER'S PERSONAL DETAILS

Member number Surname and first names

Date of birth Identity number

Marital status Date of death

Cause of death

EMPLOYER DETAILS

Employer name

Date employer notified of death

DEPENDANTS

Spouse(s) Details

Details of spouse(s)	1 st Spouse	2 st Spouse
Full name		
Date of birth		
Date of marriage		
Type of union (Civil, Customary, Asiatic, Common Law, Other)		
If, Common Law, give details of length of relationship		
Address		
Contact telephone numbers		
Were deceased and spouse(s) living together at date of death?		
If not, to what extent was the deceased supporting the spouse?		
Does the spouse stay on his/her own or with parents?		
If living on his/her own, is accommodation owned or rented?		
Is spouse employed, if so, what is his/her monthly Income?		

Partner(s) Details

Details of Partner(s)	1st Partner	2st Partner
Full name		
Date of birth		
Relationship to deceased (fiancé, boyfriend, girlfriend, other)		
Address		
Contact telephone numbers		
Give details of the length of the relationship		
Did the deceased support the person financially?		
If 'YES', please explain the extent of the support.		
Does the partner have regular job?		
If 'YES', please provide income details and proof thereof.		

Ex-spouse(s) Details

Please supply original certified copies of divorce order(s) and agreement(s).

Details of Partner(s)	1st Ex-spouse	2st Ex-spouse
Details of Ex-spouse(s)		
Full name		
Date of birth		
Date of marriage		
Type of union (Civil, Customary, Asiatic, Common Law, Other)		
Date of divorce		
If, Common Law, give details of length of relationship		
Address		
Contact telephone numbers		
At the date of death, was the deceased supporting the ex-spouse either voluntarily or in terms of a maintenance order/agreement?		
Monthly maintenance payment amount		
Has the ex-spouse remarried?		
If supported by deceased, please provide current income details of the ex-spouse and proof thereof.		

Minor Children

(Latest school report/education result to be attached for each child)

	Child no. 1	Child no. 2	Child no. 3	Child no. 4	Child no. 5
Name					
Date of birth					
Relationship to the deceased					
Guardian's name					
Guardian's address					
Guardian's contact telephone numbers					
Relationship to guardian					
Level of dependency					
School/Tertiary education					
Grade					
Full time/Part time study					

Major Children

	Child no. 1	Child no. 2	Child no. 3	Child no. 4	Child no. 5
Name					
Date of birth					
Relationship to the deceased					
Address					
Contact telephone numbers					
Details of dependency					
Highest education qualification					
Marital status					
Date of marriage					
Working (give details)					
Earning capacity					
Remarks					

Other dependants

	No. 1	No. 2	No. 3	No. 4	No. 5
Name					
Date of birth					
Relationship to the deceased					
Address					
Contact telephone numbers					
Details of dependency					

Nominees*

	No. 1	No. 2	No. 3	No. 4	No. 5
Name					
Date of birth					
Relationship to the deceased					
Address					
Contact telephone numbers					

NOMINATION FORM

Yes/No Date form completed

Details of nomination

LAST WILL AND TESTAMENT

Yes/No

If yes, please attach a copy of the Will.

* Nominees are people who were not dependant on the member but were nominated by the member to receive a portion of his/her death benefit.

Family's financial details/social circumstances

Details of other benefits paid by another fund or policy(ies) of assurance and to whom.

DECLARATION BY EMPLOYER/SOCIAL WORKER

I, the undersigned, hereby certify that all particulars furnished in this form and accompanying documentation are true and correct, and that the process to be followed by the Trustees in terms of the Rules of the Fund has been fully explained to the member's beneficiaries.

Full name

Designation

Signature Date

PROCESSING OF PERSONAL INFORMATION

The Fund is committed to the adherence and compliance of the Protection of Personal Information Act (POPIA) and is committed to ensuring the protection of the Personal Information of Members and Fund Officers. This commitment is encompassed in the Fund's Data Protection and Privacy Policy which ensures that the Fund and its Service Providers Process Personal Information responsibly and in a manner that demonstrates their commitment to upholding the right to privacy of Members and Fund Officers, subject to justifiable limitations.

It further establishes a common standard on the appropriate protection of Personal Information of Members and provides general principles regarding the right of individuals to privacy and to reasonable safeguarding and protection of their Personal Information. The Board of Management, in its commitment to comply with POPIA, requires that the Fund's Service Providers adhere to the lawful Processing of Personal Information in line with POPIA. The Data Protection and Privacy policy therefore also specifies minimum requirements and standards that are to be adhered to with regards to the Processing of Personal Information by Service Providers of the Fund.

The Fund has concluded written agreements with its service providers and will ensure that your personal information is protected through adequate provisions in these agreements. If any of the Fund's service providers are abroad, the Fund will not share your personal information with them, unless we are satisfied that they have adequate security measures in place to protect your personal information.

The Fund may use your information or obtain information about you for the following purposes:

- Underwriting in respect of Fund risk benefits
- Assessment and processing of Fund benefit claims
- Member communication
- Verification of personal information
- Claims checks (industry Life & Claims Register)
- Tracing beneficiaries
- Fraud prevention and detection
- Market research and statistical analysis
- Audit & record keeping purposes
- Compliance with legal & regulatory requirements
- Verifying your identity
- Updating your personal information
- Sharing information with service providers we engage to process such information on our behalf or who render services to the Fund.

You may access your personal information that we hold and you may also request us to correct any errors or to delete this information. In certain cases you have the right to object to the processing of your personal information.