

CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH OF A MEMBER

Please send your completed form to:

Email: info@sentinel.za.com

Hand in: at your nearest Client Service Centres situated in Sandton, Welkom, Klerksdorp, Carletonville and Witbank/Emalahleni.

Industry / Participant Number (Member)

Identity Number (Member)

IMPORTANT

Section 37C of the Pension Funds Act regulates a death benefit lump sum payable by this Fund and does not form part of the estate.

The Estates Act regulates the estate of a deceased person.

The Fund Administrator has to be informed of the death of the member as a matter of urgency either by telephone, fax or e-mail. The Fund requires information pertaining to the following beneficiaries as well as the documentation as stipulated below.

DOCUMENTS TO BE SUBMITTED WITH APPLICATION

PLEASE NOTE: FAILURE TO SUBMIT SUPPORTING DOCUMENTS OR SUBMITTING DOCUMENTS WITH ERRORS WILL DELAY THE PROCESS OF YOUR CLAIM

THE DECEASED

Certified copy of Death Certificate

Copy of ID/Passport

Copy/Copies of Divorce Orders and Agreement/s (if applicable)

Police report in the event where the member died of unnatural causes (if applicable)

Copy of medical aid Membership Certificate (if applicable)

Copy of three months' pay slips (if applicable)

Copy of the last Nomination/Beneficiary form from the Employer's records. This information has to be forward by the Employer to the Fund and is NOT acceptable with the application forms from the beneficiaries.

Termination letter from Employer

Copy of the deceased's last Will (if applicable)

Copies of previous spouse/s Death Certificate/s (if applicable)

Copies of child/ren's Death Certificate/s (if applicable)

Active Tax number of deceased

Teba Contract (Mozambique Members Only)

CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH OF A MEMBER

- CONTINUED

Industry/Participant Number(Member)

Identity Number (Member)

SPOUSE

- Completed Application form and Questionnaire by Spouse
- Copy of ID/Passport
- Copy of Marriage Certificate
- Spouse Tax Number (Spouse to register for tax if not registered)
- Stamped Bank statement (not older than 3 months) – signed and dated by account holder

CUSTOMARY LAW SPOUSES:

- Completed Application form and Questionnaire by Customary Law Spouse
- Lobola letter or Marriage Certificate from Home Affairs
- 3 Affidavits, one from the applicant and two or more from friends and family, confirming the Customary Law Marriage
- Copy of ID/Passport
- Spouse Tax Number (Spouse to register for tax if not registered)
- Stamped Bank statement (not older than 3 months) – signed and dated by account holder

CO-HABITING PARTNERS / LIFE PARTNERS:

- Completed Application form and Questionnaire by Spouse/Life Partner
- Copy of ID/Passport
- 3 Affidavits, one from the applicant and two or more from friends and family confirming the duration, extent and nature of cohabiting relationship and dependency on the deceased
- Relevant documentary proof i.e., photos, birthday cards or any other form of confirmation to be forward to the Fund
- Spouse Tax Number (Spouse to register for tax if not registered)
- Stamped Bank statement (not older than 3 months) – signed and dated by account holder

MINOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN):

- Completed Application form by parent or guardian
- Copy of ID/Passport/Birth certificate
- If a child was born out of wedlock (before marriage), 3 affidavits from parent/guardian and family members confirming the biological parents of the child Adoption Order (if applicable)
- Social Worker report if minor child is in the care of a guardian (if applicable)
- Stamped Bank statement (not older than 3 months) – signed and dated by account holder

MAJOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN):

- Completed Application form and Questionnaire by Other Parties OR Benefit Waiver Form
- Copy of ID/Passport
- If a child was born out of wedlock (before marriage), 3 affidavits from parent/guardian and family members confirming the biological parents of the child Adoption order (if applicable)

CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH OF A MEMBER

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Industry / Participant Number (Member)

Identity Number (Member)

MAJOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN) (CONTINUED):

Equal split form ONLY when major children are applying (no spouse/partner applying)

Affidavit confirming that the deceased never remarried or was in a cohabiting relationship or had any financial dependents after his spouse (mentioning the spouse's name), passed away (if applicable).

3 Affidavits if a major child was financially dependent on the deceased. One from the major and two or more affidavits from friends or family confirming the duration, extent and nature of dependency on the deceased.

Stamped Bank statement (not older than 3 months) – signed and dated by account holder

OTHER DEPENDANTS: FACTUAL OR LEGAL DEPENDANTS:

Factual dependants refer to any other person who was partially or fully dependent on the deceased at the time of his/her death, i.e., stepchildren, parents, nieces, nephews and siblings. Legal dependants refer to maintenance payable by the deceased to an ex-spouse or children at the time of his/her death.

Completed Application form and Questionnaire by Other Parties

Copy of ID/Passport/Birth certificate

3 Affidavits, one from the applicant and two or more from friends and family confirming the duration, extent and nature of the financial dependency on the deceased

Relevant documentary proof, at least six months proof of bank statements or any other documentation reflecting payments received from the deceased

Maintenance paid to child/ren, copy/copies of the Maintenance Order/s (if applicable)

Stamped Bank statement (not older than 3 months) – signed and dated by account holder

FUTURE LEGAL DEPENDANTS:

A person whom the member would have become legally liable for had he not died i.e., a posthumous child or fiancé.

Completed Application form and Questionnaire by Other Parties

Copy of ID/Passport/Birth certificate

Relevant documentary proof i.e., engagement invitation, proof of purchase of ring and congratulation cards

3 Affidavits, one from the applicant and two or more from friends and family, with regards to the engagement, confirming onset of the relationship, duration, extent and nature of dependency on the deceased up to his/her date of death.

Stamped Bank statement (not older than 3 months) – signed and dated by account holder

NOMINEES:

The benefit will become payable twelve (12) months after the date of death of the deceased, if the deceased is not survived by any dependants

Completed Application form and Questionnaire by Other Parties

Copy of ID/Passport

Solvency letter from the Executor of the deceased's estate

No Spouse/Partner form

Stamped Bank statement (not older than 3 months) – signed and dated by account holder

CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH OF A MEMBER

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ESTATE PAYMENTS:

The benefit will become payable to the estate twelve months after the date of death if the deceased is not survived by any dependants or nominees.

ESTATE PAYMENTS - DEATH OF MEMBER

Completed application form by Executor of the deceased's estate

Certified copy of Letter of Executorship

ID copy of the Executor

Affidavit confirming no financial dependants at the time of his/her death

No Spouse/Partner form

Stamped Bank statement (not older than 3 months) – Estate account signed and dated by executor

ESTATE PAYMENTS - DEATH OF SPOUSE PENSIONER

The benefit will only be payable to the estate of the deceased spouse pensioner

Completed application form by Executor of the spouse's deceased estate

Certified copy of Letter of Executorship

ID copy of the Executor

Stamped Bank statement (not older than 3 months) – Estate account signed and dated by executor

Death benefits paid by retirement funds, either as a monthly pension or as a lump sum, do not form part of the Estate of the deceased.

Death benefits are therefore not subject to Estate Duty. The law of succession, or inheritance as it is commonly referred to, does not apply either.

Any allocation received by a person who is married in community of property is excluded from the marital power of his/her spouse and does not form part of their joint Estate.

Signature

Electronic signatures are not permitted to be used on this Application Form.

Date

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Sandton: 5th Floor, 92 Rivonia Road, Wierda Valley, Sandton, 2196 | **Toll-Free** 0800 776 861
Carletonville: S Buys Office Park, Shop 10, Corner Kaolin and Radium Streets, Tel (011) 481 8290/1
Klerksdorp: 54 Buffelsdoorn Road, Flamwood, Tel (011) 481 8024/8 | **Welkom:** Shop 25, The Strip, 314 Stateway, Tel (011) 481 8025/6
Emalahleni / Witbank: WCMAS Building, Corner OR Tambo and Susanna Streets, Tel (011) 481 8295/6