

FLEXIBLE PENSION OPTION (SPOUSE / LIFE PARTNER)

WHERE THE DECEASED WAS A FLEXIBLE PENSIONER



Please send your completed form to:

E-mail: info@sentinel.za.com

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

Industry / Participant Number

Identity / Passport Number

Note that this document should only be completed by the spouse of a pensioner who elected a flexible monthly pension at date of retirement.

PERSONAL DETAILS OF APPLICANT

Title	Initials	Surname	
Full Names (First Two Names)			
1		2	
Identity / Passport Number			

CONTACT DETAILS

Telephone Number	Code		Number	
Mobile Number	Code		Number	
E-mail				

PLEASE INDICATE THE PREFERRED METHOD OF COMMUNICATION BY THE FUND BY TICKING THE APPLICABLE BLOCK

SMS	☐	E-MAIL	☐	TELEPHONIC	☐	POSTAL	☐
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FRIEND / RELATIVE DETAILS

Title	Initials	Surname
Mobile Number		

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FLEXIBLE PENSION OPTION

1. CONTINUE TO BE PAID IN TERMS OF THE RULES OF THE FLEXIBLE MONTHLY PENSION

A Continue with the current Draw Down rate

B Continue with a different Draw Down rate

THE DRAW-DOWN PERCENTAGE PER ANNUM MAY NOT BE LESS THEN 2,5% PER ANNUM AND NOT EXCEED 17,5% PER ANNUM

Elected draw down rate per annum

%

2. CONVERT ALL THE FUNDS IN THE CAPITAL ACCOUNT INTO A GUARANTEED PENSION

Term Certain Guarantee

5 Years

10 Years

15 Years

20 Years

25 Years

3. PARTIAL CASH WITHDRAWAL

That an amount of R , be paid as a lumpsum and the balance.

A Converted into a Guaranteed Pension

Term Certain Guarantee

5 Years

10 Years

15 Years

20 Years

25 Years

B Remain in the Flexible Pension

Elected draw down rate per annum

%

4. BE CAPITALISED AND PAID AS A LUMPSUM

Capitalised and Paid as a Lumpsum

IMPORTANT: On the death of the Spouse/Life Partner (in receipt of a spouse's pension) the monthly pension shall cease and any amounts payable, if applicable, shall be paid to the Spouse/Life Partner's estate in terms of the Rules.

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BANK DETAILS

Supporting documents:

- Stamped account confirmation letter (not older than 3 months) – signed and dated by account holder, OR
- Stamped Bank statement (not older than 3 months) – signed and dated by account holder

Surname															
Initials															
ID/Passport Number															
Name of Bank															
Branch Name															
Branch Code				Account Number											
Date opened	Y	Y	Y	Y	M	M	D	D	Savings		Cheque				

Signature of Member

Date

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

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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

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FLEXIBLE PENSION INVESTMENT CHOICE ELECTION FORM TO BE COMPLETED ONLY WHEN THE FLEXIBLE OPTION IS CHOSEN

FLEXIBLE PENSION CREDIT (This is your existing capital in the Fund) Indicate your selection and % of total Flexible Pension Credit.

IMPORTANT: Before exercising an option, you are urged to consult the Brochure and obtain professional advice.

You are strongly encouraged to contact the Fund should you require any assistance with making a Flexible Pension Investment Choice decision!

I understand that should I elect to exercise a Flexible Pension Investment Choice option, the responsibility lies with me to notify the Fund in the event that I wish to amend my investment selection.

I acknowledge that I understand the implications of my investment selection.

FLEXIBLE ANNUITY CAPITAL. Indicate your selection and % of total capital.

PORTFOLIO (Select at least one)	COMMENT	% ALLOCATION			
Wealth Builder	You may elect to invest all, or a portion of, your Flex Annuity Capital in <u>ONE</u> of these portfolios. You may also elect not to invest in any of these four portfolios by leaving it blank.				0-100%
Inflation Protector					0-100%
Pension Protector					0-100%
Shari'ah					0-100%
Money Market	You may elect to invest all, or a portion of, your Flex Annuity Capital in this portfolio. You may also elect not to invest in this portfolio by leaving it blank.				0-100%
THE TOTAL OF YOUR PERCENTAGE ALLOCATIONS MUST EQUAL 100%					0-100%

Signature

Date

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