

SPOUSE OPTION FORM (PIC)



Industry / Participant Number of Deceased

Identity / Passport Number of Deceased

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.

My election is irrevocable, and the Fund will not be obliged to allow the transaction to be reversed once payment has been made.

SECTION 1: PERSONAL DETAILS - ALL FIELDS TO BE COMPLETED

Title	Initials	Surname	
Full Names (First Two Names in Full)			
1		2	
Tax Number*		Gender	☒ F ☐ M
Cause of Death			

* Compulsory

RESIDENTIAL ADDRESS - ALL FIELDS TO BE COMPLETED

House/Complex No	Complex Name		
Street Address			
Suburb		Postal Code	
City			

POSTAL ADDRESS - ALL FIELDS TO BE COMPLETED

PO Box Number	Suburb, City or Town	Postal Code

CONTACT DETAILS - ALL FIELDS TO BE COMPLETED

Telephone Number	Code		Number	
Mobile Number	Code		Number	
Email				

Please indicate the preferred method of communication

SMS

E-MAIL

TELEPHONIC

POSTAL

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SECTION 2: PENSION OPTION FOR THE SPOUSE OF THE DECEASED ONLY

2.1 LUMP SUM OPTION

(A) PENSION OPTION FOR THE SPOUSE OF THE DECEASED ONLY

In the event that a lumpsum is awarded to me, I elect for the lumpsum to be treated as follows (Tick the applicable block)

Paid to me as a full lumpsum

Converted in full to a monthly pension

I elect to convert

R

of the lump sum due to me into an additional lifelong monthly pension

2.2 GUARANTEED PENSION ONLY

PENSION OPTION FOR THE SPOUSE OF THE DECEASED ONLY

50% Of Benefit To Be Utilised To Purchase A Monthly Pension

PLEASE INDICATE YOUR SELECTION BY MARKING ONE OF THE FOLLOWING (Tick Applicable Block)

Term Certain Guarantee

5 Years

10 Years

15 Years

20 Years

25 Years

2.3 FLEXIBLE PENSION ONLY

The draw-down percentage per annum may not be less than 2,5% per annum and not exceed 17,5% per annum.

*Elected draw down rate per annum

%

*Compulsory – Please complete this section

INDIVIDUAL INVESTMENT CHOICE

Please note that this is an important reminder regarding the selection process: only one portfolio can be selected.

PORTFOLIO	COMMENT	% ALLOCATION
Please tick the applicable block for your portfolio of choice (Select only one)		
☐ 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

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

Date

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3.4 HYBRID PENSION

COMBINATION OF A GUARANTEED PENSION AND A FLEXIBLE PENSION

Amount of monthly pension required from the guaranteed pension R ,

(The balance of the capital after securing the guaranteed pension will be transferred to the flexible pension)

OR

CAPITAL ALLOCATION AFTER THE LUMP SUM

Guaranteed pension %

Flexible pension %

PLEASE INDICATE YOUR SELECTION BY MARKING ONE OF THE FOLLOWING (Tick Applicable Block)

Term Certain Guarantee 5 Years 10 Years 15 Years 20 Years 25 Years

INDIVIDUAL INVESTMENT CHOICE

Please note that this is an important reminder regarding the selection process: only one portfolio can be selected.

PORTFOLIO	COMMENT	% ALLOCATION
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Please tick the applicable block for your portfolio of choice (*Select only one*)

☐	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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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