

DEPENDANTS AND NOMINEES FORM

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Leader In People Benefits In Africa

To the Trustees of

Full name of Fund in BLOCK CAPITALS

NAME OF MEMBER (BLOCK CAPITALS):

Co. Ref. No.:

NAME OF EMPLOYER:

Branch/Site/Plant Name:

1. In terms of the Pension Funds Act, a member's dependants and persons who are not dependants but who are nominated by the member must be taken into account by the Trustees when they decide in what shares lump sum benefits are to be paid on the death of a member. To assist the Trustees in making their decision please complete Section 2 to 4 below.

Please read the reverse side of this form before filling in the spaces below.

2. DEPENDANTS:

Surname	First Names	Gender	Date of Birth	Share of Benefit	Relationship

3. NOMINEES:

Surname	First Names	Gender	Date of Birth	Share of Benefit	Relationship

4. I, the undersigned, recognise that my circumstances and those of the persons shown above as dependants and/or nominees may change. I accept that it will be necessary for me to advise the Trustees of the Fund when any change should be made regarding my dependants or nominees.

SIGNED:

DATE:

DEPENDANTS AND NOMINEES FORM



Leader in People Benefits in Africa

DISPOSAL OF LUMP SUM DEATH BENEFITS (THIS EXPLANATION IS NOT A LEGAL DOCUMENT - THE WORDING OF THE ACT IS DEFINITIVE)

In terms of the Pension Funds Act, a member's dependants and persons who are not dependants but who are nominated by the member must be taken into account by the Trustees when they decide in what shares lump sum benefits are to be paid on the death of a member of a registered pension or provident fund.

PLEASE LIST YOUR DEPENDENTS AND ANY NOMINEES ON THE OTHER SIDE OF THIS FORM AFTER YOU HAVE READ THE FOLLOWING NOTES.

Briefly, the position is as follows:

- (a) the following categories of persons will be dependants;
 - (i) persons for whose maintenance the member is legally liable;
 - (ii) persons whom the trustees consider to have been dependant upon the member at the time of his/her death;
 - (iii) the spouse and children (both minor and major) of the deceased member; and
 - (iv) persons for whose maintenance the member would have become legally liable if he or she had not died (for example an unborn child);
 - (b) if there are dependants and no nominees, payment must be made to, or for the benefit of, one, some or all of those dependants in such proportions as the Trustees shall determine;
 - (c) if there are no dependants but the member has nominated one or more persons who are not dependants to receive part of all of the benefit, then such nominees only receive payment after payment of debts in the deceased estate if the member's estate is insolvent;
 - (d) if there are dependants and the member has nominated one or more persons who are not dependants to receive part or all of the benefit, the Trustees shall determine the proportion which is to be paid to each dependant and the proportion paid to each nominee (a nil proportion may be allocated);
 - (e) only if there are no dependants, and then only to the extent that payment is not due to a nominee, shall any balance remaining be paid to the deceased member's estate or, where appropriate, the Guardian's Fund;
 - (f) Trustees have the right to pay a trust for the benefit of a minor dependant or minor nominee or to pay the lump sum in the form of installments over a period of time;
 - (g) if there are both dependants and nominated beneficiaries, such nomination must have been made on or after 30 June 1989. Nominations made prior to that date are not valid.
 - (h) lump sums can be paid in the form of installments over a period of time to major dependants or nominees, if agreed in writing with the dependant or nominee
- NOTES
- (i) any income tax payable will be deducted before lump sum benefits are allocated to dependants and nominees;
 - (ii) the fact that a person is classified as a dependant or nominee does not mean that the Trustees must award him or her any benefit from the fund;
 - (iii) an institution (e.g. an old-age home) can be chosen as a nominee;
 - (iv) the requirements set out above do not apply to pensions payable to spouses or dependants in terms of specific provisions of the rules; such pensions are payable as described in the rules;
 - (v) the requirements set out above do not apply to free-standing Group Life Assurance Funds;
 - (vi) prior to 19 April 1996 major children did not automatically qualify as dependants.