



## CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH BENEFIT APPLICATIONS

### REQUIREMENTS

The Fund administrators must be informed of the death as a matter of urgency either per telephone, fax or e-mail. The Fund requires information pertaining to the following beneficiaries as well as the documents as stipulated.

### DOCUMENTS REQUIRED

#### THE DECEASED:

- Certified copy of death certificate
- Copy of ID or passport or birth certificate
- Copies of divorce orders and agreements (If Applicable)
- Police report in the event where the person died of unnatural causes (If Applicable)
- Copy of medical aid membership certificate (If Applicable)
- Copies of three months pay slips (If Applicable) (In-service death only)
- Copies of any relevant nomination forms on mine records (In-service death only)
- Copy of last will (If Applicable)
- Termination letter (In-service death only)
- Copies of previous spouse's death certificates (If Applicable)
- Copies of children's death certificates (If Applicable)
- Tax number of deceased

#### SPOUSE / LIFE PARTNER:

- Completed application form (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- Copy of marriage certificate
- Completed income and expenditure form (If Applicable)
- Application for Pension Income Choice (In-service death only)

#### CUSTOMARY LAW SPOUSES

- Completed application form (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Lobola certificate
- 3 affidavits from responsible persons confirming the customary law marriage
- Copy of ID or passport or birth certificate
- Completed income and expenditure form
- Application for Pension Income Choice (In-service death only)

#### CO-HABITING PARTNERS

- Completed application form (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- 3 Affidavits from responsible persons confirming the duration of co-habiting relationship and the extent of dependency on the deceased
- Relevant documentary proof (i.e. photo's, birthday cards, obituary, etc).
- Income and expenditure form
- Application for Pension Income Choice (In-service death only)

#### **MINOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN)**

- Completed application form by parent or guardian (Bank to complete, sign and stamp banking page)
- Copy of ID or passport or birth certificate
- If a child was born out of wedlock, 3 affidavits from parent or guardian and family confirming the deceased's paternity of the child
- Adoption order (If Applicable)
- Social worker report if minor child is in the care of a guardian (If Applicable)

#### **MAJOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN)**

- Completed application form (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- Adoption order (If Applicable)
- Income and expenditure form
- Equal split letter if only majors are applying (If Applicable)
- Affidavit confirming that the deceased never remarried or was in a cohabiting relationship or had any financial dependants after his spouse died. (If Applicable)

#### **OTHER DEPENDANTS**

##### **FACTUAL DEPENDANTS**

Factual dependants include any other person, who is not a legal dependant, who was partially or fully dependent on the deceased at the time of death. (i.e. Step children, Parents, Nieces, Nephews, Siblings, etc.)

- Completed application forms (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- 3 affidavits confirming the nature, extent and duration of the dependency
- Relevant documentary proof (i.e. Bank statements, etc.)
- Income and expenditure form

##### **FUTURE LEGAL DEPENDANTS**

A person whom the member would have become legally liable for had he not died. (e.g. posthumous child, fiancé, etc.)

- Completed application forms (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- Relevant documentary proof (i.e. engagement, purchase of ring, invitations, etc.)

##### **NOMINEES**

A benefit will become payable twelve months after the date of death of the deceased, if the deceased is not survived by any dependants.

- Completed application forms (Bank to complete, sign and stamp banking page)
- Completed questionnaire
- Copy of ID or passport or birth certificate
- Solvency letter from Estate (If Applicable)

##### **ESTATE PAYMENTS**

A 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 and the following documents will be required.

- Completed application form by Executor of estate (Bank to complete, sign and stamp banking page)
- Certified copy of Letter of Executorship
- Letter confirming that the deceased is not survived by any dependants