



CHECKLIST OF DOCUMENTATION REQUIRED FOR DEATH OF A PENSIONER

REQUIREMENTS

The Fund Administrator has to be informed of the death of the pensioner 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 REQUIRED

THE DECEASED:

- Copy of Death Certificate
- Copy of ID/Passport
- Copy/ies of Divorce Orders and Agreement/s (if applicable)
- Police report in the event where the pensioner died of unnatural causes (if applicable)
- Copy of medical aid Membership Certificate (if applicable)
- 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

SPOUSE:

- Completed Application form and Questionnaire by Spouse
- Copy of ID/Passport
- Copy of Marriage Certificate

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

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 the co-habiting 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

MINOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN)

- Completed application form by parent or guardian
- 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)
- Social Worker report if minor child is in the care of a guardian (if applicable)

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)
- Equal split form **ONLY** when major children are applying (no spouse/partner applying)
- Affidavit confirming that the deceased never remarried, or in a cohabiting relationship or had any financial dependents after his spouse (mentioning spouse's name), passed away
- 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.

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. step children, 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 of the dependent
- 3 Affidavits, one from the applicant and two or more from friends or 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/ies of the Maintenance Order/s

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 or 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

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

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.

- 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