

## CHECKLIST OF DOCUMENTATION REQUIRED FOR IN-SERVICE DEATH BENEFIT APPLICATION

### 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
- Police report in the event where the person died of unnatural causes
- Copy of medical aid membership certificate
- Copies of any relevant nomination forms on mine records
- Copy of last will if available
- Record of service (In-service death only)
- Copies of previous spouse's death certificates (If Applicable)
- Copies of children's death certificates (If predeceased by member/pensioner)

#### SPOUSE / LIFE PARTNER:

- Completed application form
- Completed questionnaire
- Copy of ID or passport or birth certificate
- Copy of marriage certificate
- Completed income and expenditure form
- Application for Pension Income Choice (Only applicable for in-service death)

#### CUSTOMARILY LAW SPOUSES

- Completed application form
- 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

#### CO-HABITING PARTNERS

- Completed application form
- 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
- Any other form of proof like photo's, birthday cards, obituary etc.
- Income and expenditure form

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

- Copy of ID or passport or birth certificate
- If a child was born illegitimately 1 affidavit from parent or guardian confirming the deceased's paternity of the child
- Adoption order if applicable

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

- Completed application form
- 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
- Affidavit confirming that the deceased never remarried or was in a cohabiting relationship or had any financial dependants after his spouse died (only in the event where major children are applying)

#### **OTHER DEPENDANTS (FACTUAL DEPENDANTS)**

- The dependants include any other person, who is not a legal dependant, who was partially or fully dependant on the deceased at the time of death. (i.e. Step children, Parents, Nieces, Nephews, Siblings etc.)
- Completed application forms
- Completed questionnaire
- Copy of ID or passport or birth certificate
- 3 affidavits confirming the nature, extent and duration of the dependency
- Relevant documentary proof (e.g. Bank statements etc.)
- Income and expenditure form

#### **FUTURE LEGAL DEPENDANTS**

- A person whom the member would have become legally liable for maintenance had he not died. (e.g. posthumous child, fiancé)
- Proof of engagement e.g. purchase of ring, invitations, etc.

#### **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
- Certified copy of Letter of Executorship
- Letter confirming that the deceased is not survived by any dependants
- Estate Bank details