



WITHDRAWAL APPLICATION – FULL TRANSFER (CONTINUED)

DETAILS OF FINANCIAL INSTITUTION

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--------------------------|---|--------------------------|---|---|----------------------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Name Of Financial Institution | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Full Name of Approved Fund | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Retirement Annuity Fund (Tax Free) | <input type="checkbox"/> | Approved Preservation Pension Fund (Tax Free) | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Pension Fund (Tax Free) | <input type="checkbox"/> | Approved Provident Fund (TAXABLE) | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Fund SARS Registration Number | 1 | 8 | / | 2 | 0 | / | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Fund FSB Registration Number | 1 | 2 | / | 8 | / | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | |
| Policy /Membership Reference Number | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

BANKING DETAILS OF FINANCIAL INSTITUTION

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|------------------------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|-------------|----------------------|--|--|--|--|--|
| Name of account holder | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name of Bank | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Branch name | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Account number | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | Branch code | <input type="text"/> | | | | | |

FINANCIAL ADVISOR/INTERMEDIARY DETAILS

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|-------------------------------------|----------------------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Name | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Financial Advisor/Intermediary Code | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FAIS Registration Number | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tel No | Code | <input type="text"/> | | | | | | | | | | | | Number | <input type="text"/> | | | | | | | | | | | | | | | |
| E-Mail | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

IMPORTANT : DOCUMENTARY REQUIREMENTS CHECKLIST

| | | |
|---|--|--------------------------|
| 1 | Copy of Identity Document or copy or passport (only if no identity document exists). | <input type="checkbox"/> |
| 2 | Proof of termination of Employment. | <input type="checkbox"/> |
| 3 | Relevant Divorce Order and Divorce Agreement (if applicable). | <input type="checkbox"/> |



WITHDRAWAL APPLICATION – FULL TRANSFER (CONTINUED)

Industry Number (Member)

DECLARATION BY MEMBER

By signing this form I confirm that I realise, understand, acknowledge and am satisfied that:

- I have read the brochure and understand the content and implications contained therein.
- The application for benefits may be cancelled in the event of the application form not having been properly completed and the required supporting documents not having been submitted with the application form.
- I have a period of 24 months after termination of my service or contributory membership in which to elect an option. This includes the option to retain membership as a non-contributory member subject to the terms and conditions contained in the Rules of the Fund.
- I may qualify for a lifelong pension if I am eligible for an early retirement benefit or if I can prove I am totally and permanently disabled as envisaged in the Rules.
- I confirm that I am aware of the tax implications in the event of electing a transfer benefit.
- I can only transfer my fund credit if I terminate my membership of the Fund. If I do so I will not qualify for a retirement benefit and will thus forfeit any claim to a lifelong monthly pension for myself or for my spouse on my death.
- My fund credit on transfer will not include death or disability cover. Such cover ceases when my service or contributory membership ceases.
- If I knowingly mislead the Fund or withhold relevant information, including those in relation to divorce, civil and/or criminal proceedings can be instituted against me. The Fund will be absolved of liability for loss which any person may suffer as a result.
- My financial advisor is qualified and authorised in terms of the applicable legislation to provide the services rendered and must disclose available options and other information relevant to me. I cannot hold the Fund liable if my advisor did not disclose information or gave inappropriate advice which may result in me suffering any loss or inconvenience.
- My election is irrevocable and the Fund will not be obliged to allow the transaction to be reversed once payment has been made.
- Transfer according to my instructions will constitute full and final settlement of all claims against the Fund. The Fund will have no further liability toward any person in respect of this or any other benefit relating to my membership.

I hereby elect to transfer my fund credit in line with the above application.

Signature of Member

Date (YYYYMMDD)

Please send your application form and required documents to :
Sentinel Retirement Fund,

Post : P O Box 61172, Marshalltown, 2107, Fax.: (011) 481-8111, E-mail : info@sentinel.za.com