

SECTION A: PERSONAL DETAILS (TO BE COMPLETED BY THE EXITING MEMBER)

Surname: <input style="width: 90%;" type="text"/>	Full Names: <input style="width: 90%;" type="text"/>
Salary Reference Number: <input style="width: 90%;" type="text"/>	ID No: <input style="width: 90%;" type="text"/>
Exit Date from the Fund: <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/> <input style="width: 15px;" type="text"/>	Income Tax Number: <input style="width: 90%;" type="text"/>
Cell Phone No: <input style="width: 90%;" type="text"/>	Home No: <input style="width: 20%;" type="text"/> <input style="width: 60%;" type="text"/>
E-Mail: <input style="width: 95%;" type="text"/>	
Postal Address: <input style="width: 95%;" type="text"/>	
<input style="width: 45%;" type="text"/>	Postal Code: <input style="width: 20%;" type="text"/>

COURT ORDERS – COMPULSORY TO COMPLETE
 Do you have any court order(s) and/or maintenance order(s) against your benefit? Yes No
 If "Yes", please attach:
 * Original certified copy/copies of the court/maintenance order(s)
 * Contact details of your former spouse/s (if not already supplied to Momentum Retirement Administrators)

SECTION B: BENEFIT PAYMENT OPTIONS (to be completed by members retiring from service or who elected VSP / VERP)

Please select the relevant options below.

(i) **Deferred Retiree: Full Benefit** will be preserved in the Telkom Retirement Fund until later retirement from the Telkom Retirement Fund.

(ii) Transfer full / part of benefit to another registered insurer, complete the table in **Section E** below and attach copy of proposal or application form.

(iii) To commute R (max. one-third) of the total available benefit for a cash lump sum.

(iv) Full pension from the Telkom Retirement Fund (that is, to receive a monthly pension **only** without any cash lump sum). **Option A Form must be completed and attached to this claim form** (obtainable from HR).

All employees choosing to receive a pension from the Telkom Retirement Fund must indicate the chosen level of spouse's pension payable to their surviving spouse upon their death after retirement.

Chosen Spouse's %

a) 50% b) 65% c) 80% d) 100% e) Other (require special calculations)

NB: Please note that the higher the after-retirement spouse's benefit you choose, the lower your initial pension will be.
 Should a member wish to take a different percentage spouse's pension, the member should send the request through to Telkom@momentum.co.za for such a quotation.

SECTION C: BENEFIT PAYMENT OPTIONS (to be completed by members withdrawing from service)

Type of withdrawal [indicate the appropriate option with a tick]

Resignation Dismissal VSP / VERP / Retrenchment

Please select the relevant options below.

(i) **Preserved Member:** Benefit (full or partial) will be preserved in the Telkom Retirement Fund. Preserved members may retire from age 55.

(ii) Full cash

(iii) Part cash part transfer, insert cash amount R and complete the table in **Section E** below and attach copy of proposal or application form.

(iv) Full transfer of benefits to another registered insurer, complete the table in **Section E** below and attach copy of proposal or application form.

SECTION D: DETAILS OF DEBT (to be completed by the Employer)

The recovery of personal indebtedness of the employer is not permitted.

Cause of Employee's Debt: Compensation of damaged caused by an employee

Housing Guarantee	Date:	D	D	M	M	Y	Y	Y	Y	R								
Theft	Date:	D	D	M	M	Y	Y	Y	Y	R								
Dishonesty	Date:	D	D	M	M	Y	Y	Y	Y	R								
Fraud	Date:	D	D	M	M	Y	Y	Y	Y	R								
Misconduct	Date:	D	D	M	M	Y	Y	Y	Y	R								

Claims against the member's benefits are limited to the provisions of Section 37D of the Pension Funds Act 24 of 1956 (as amended) which are as follows:

- Amounts due to the Fund or Employer in respect of any housing loan including guarantee/s by the Fund or Employer for such a loan.
- Amounts due by a member in respect of losses suffered by the Employer through theft, dishonesty, fraud or misconduct by the member and in respect of which:
 - Member has admitted liability in writing.
 - Judgment has been obtained against the member in any court of law (Section 300/ civil litigation).

SECTION E: RECEIVING FUND DETAILS IN CASE OF TRANSFERING TO ANOTHER REGISTERED FUND OR INSURER

Name of receiving fund, preservation fund or retirement annuity:
Name of underwriter or insurer:
Contact name:
Contact e-mail address:
Banking details in respect of the receiving fund will be obtained from the Recognition of Transfer Form.

SECTION F: METHOD OF PAYMENT FOR CASH PORTION / MONTHLY PENSIONS FROM THE FUND

Electronic Fund Transfer (Must be your own bank account.)

Name of account holder	
Name of bank	
Name of branch	
Account number	
Bank branch code	
Type of account	

Note: No joint account acceptable for the payment of the monthly pensions from the Telkom Retirement Fund.

SECTION G: DECLARATION BY MEMBER

The options in terms of the Rules of the Telkom Retirement Fund have been fully explained to me and I confirm that I fully understand the implications of the choices elected. I also certify that all particulars furnished in this form and accompanying documentation are true and correct.

D	D	M	M	Y	Y	Y	Y
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Member's signature

SECTION H: TO BE COMPLETED BY THE EMPLOYER

DECLARATION BY EMPLOYER

I, _____

the undersigned hereby certify that all particulars furnished in this form and accompanying documentation are true and correct.

Signed on behalf of employer

Employer's signature

Designation _____

Date

D	D	M	M	Y	Y	Y	Y
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OFFICIAL
COMPANY
STAMP