

## Death claim – pensioner

The purpose of this form is to inform a fund of the death of a pensioner so that the fund can process any death benefit that becomes due.

In this form:

- 'You' refers to the spouse or eligible children.
- 'We' and 'us' refer to the company in Alexander Forbes that is shown at the top of this form, who is also the administrator of the fund.
- 'Fund' refers to the fund listed in the form

### Key points to understand about this form

If you do not complete all the information on this form, the payment of the benefit will be delayed. Please read this document carefully, and contact us if you have any questions.

### Documents you must attach to this form

You must attach copies of the documents requested in the covering letter to this form. If any information is not yet available, you can send them to us as soon as you have them.

\*A spouse is the person the pensioner was married to under the laws of South Africa, according to the laws of their religion or in a customary union, or who the member was living with in a long-term relationship.

Please hand us this claim form as soon as possible but bear in mind that we will only start the rest of the death claim process once we have received all the documents we need.

### Follow these steps

1. You need to fill out the form attached to the letter.
2. Attach the documents requested above to the completed form.
3. Keep the first and second pages of this form to refer to for any queries and only submit pages 3 to 6 and supporting documents.
4. Complete the declaration in the form and submit it directly to the contact person at Alexander Forbes.

### Personal information, privacy and security

**FIND OUT** how we protect your personal information, privacy and security.

Alexander Forbes is not responsible for any loss the deceased or anyone else may suffer if important information is left out of this document.

### How to contact us

- If you want to ask us if we have your personal information, you can contact us at the telephone number shown at the top of the form.
- If your personal information is incorrect, we will change it if you make us aware of this.

### If you have a complaint

We would like to hear from you if you have a complaint:

- Visit us in person at any of our offices
- Email [contactus@alexforbes.com](mailto:contactus@alexforbes.com)
- Phone 0860 000 279 or +27 (0)11 669 7026 if you're outside South Africa
- Follow our complaints process at [www.alexforbes.com/contactus/complaints.aspx](http://www.alexforbes.com/contactus/complaints.aspx).

### If you need more information

- Please contact us if you have any questions or if you need more information

## Death claim – pensioner

Name of retirement scheme

Pension reference number (if available)

### Part 1: About the deceased pensioner

Please fill in all the information in this section.

#### Personal details

Surname

First names

Title  Prof  Dr  Mr  Mrs  Ms  Other (specify)

ID or passport number

Country of issue

Date of birth

D	D	M	M	Y	Y	Y	Y
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**Residential address** (this is the address where the pensioner lives most of the time)

Unit number

Complex

Street number

Street or farm name

Suburb

City or town

Country

Code

**Postal address**

Code

#### Tax details

Date of death

D	D	M	M	Y	Y	Y	Y
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Income tax number

## Part 2: About the spouse

Please fill in all the information in this section.

### Personal details

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

ID or passport number

Country of issue

Date of birth

### Residential address (this is the address where the spouse lived most of the time)

Unit number

Complex

Street number

Street or farm name

Suburb

City or town

Country

Code

### Postal address

Code

### Contact details

Cell

Home

Work

Email

### Tax details

Income tax number

Country of residence for tax purposes

### Payment instructions

Please make sure that the bank account details below are for your own account and matches the details exactly as per the bank statement. If you do not give complete and correct information about banking details, there might be a delay in making this payment.

Account holder's name

Name of bank

Account number

Branch code

Type of account:

Current

Savings

Transmission

### Part 3: About the children

Please complete if the rules of the fund provides a child's pension on the death of a pensioner.

Please list your children below:

#### Child 1

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

Date of birth

Relationship

Sex  Male  Female

Identity number

#### Contact details

Cell

Home

Email

#### Child 2

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

Date of birth

Relationship

Sex  Male  Female

Identity number

#### Contact details

Cell

Home

Email

#### Child 3

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

Date of birth

Relationship

Sex  Male  Female

Identity number

#### Contact details

Cell

Home

Email

**Child 4**

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

Date of birth

Relationship

Sex  Male  Female

Identity number

**Contact details**

Cell

Home

Email

**Child 5**

Surname

First names

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

Date of birth

Relationship

Sex  Male  Female

Identity number

**Contact details**

Cell

Home

Email

**Spouse's declaration**

This section needs to be completed by the spouse (you).

By signing this section of the form, you confirm that:

1. The details that you have provided to us are complete and accurate. We will accept the claim form as accurate unless you tell us about any changes within one business day of submitting the form. (Note that business days are Mondays to Fridays, excluding Saturdays, Sundays and official South African public holidays.)
2. You agree that if anyone suffers any loss because you have given incorrect or incomplete information in this form, neither Alexander Forbes nor the fund is responsible for the loss.
3. You have signed the form.

Your full name

Your signature \_\_\_\_\_

Date

Contact number

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