

Please complete using **CAPITAL/BLOCK LETTERS** in blue or black ink.

FUND SELECT ANNUITY CONTACT DETAILS

For queries or submitting your Fund Select Annuity Quotation request:

Telephone number 0860 388 873

Email For SuperFund members SuperFundAnnuity@oldmutual.com For other fund members Fundselect@oldmutual.com

Servicing hours 08:00 to 17:00 Monday to Thursday
08:00 to 15:00 Fridays
Closed on Saturdays and Sundays

A. MEMBER (FIRST LIFE) DETAILS

Fund name

Scheme code

Membership number

Title Mr Ms Mrs Other Initial(s)

Surname

First name(s)

Identity number

Gender Male Female

Telephone Code No.

Cellphone number

Email address

B. QUOTATION BASIS

Please note that your quotation will be based on the default parameters chosen by your fund trustees. If you require details of your trustee default basis, please contact your Fund's Principal Officer or call Member Support Services on 0860 388 873 who will be able to provide these to you. Otherwise you may choose your own parameters below.

RETIREMENT/QUOTE DATE AND BENEFIT

Date of retirement/quote

Total retirement fund savings to be used for the quotation R

ANNUITY (MONTHLY PENSION/INCOME)

Note to Pension Fund members:

If your total retirement fund savings is greater than R247 500 you must use a minimum of two thirds (2/3 or 66.66%) of that to buy an annuity (pension). The balance may be taken in cash subject to Income Tax regulations, i.e. you may take a maximum of one third (1/3 or 33.33%) of your retirement fund savings in cash.

Select below what percentage (%) or rand amount of your total retirement fund savings you choose to take in cash. Remember that the less you take in cash the higher the monthly pension you can buy and the less tax you may pay on your cash portion.

% OR Flat amount R

MINIMUM GUARANTEED PERIOD

While your monthly pension is payable for your lifetime, you may choose a **minimum guaranteed period** effective from your date of retirement, for which your monthly pension will continue to be paid in full even if you pass away during this period. You may choose a period between 1 and 25 years.

Note that the chosen minimum guaranteed period will have an impact on your starting monthly pension.

years (between 0 and 25 years)

SECOND LIFE

You may choose to include a **second life** (e.g. your spouse, partner or disabled child etc. – more than one may be added) to receive a monthly pension if you pass away before him/her. The monthly pension payable to this second life is also payable for his/her lifetime. Once a second life has been added, he/she cannot be removed or changed. I.e. you will not be able to add a different life at a later stage. In the event of divorce, (where a spouse has been added), the second life will still receive a monthly pension if you pass away before him/her.

Note that your chosen second life details will have an impact on your starting monthly pension.

Single life annuity (Pension for me only)

OR

Joint life annuity (Pension for me and another person)

If joint life, please provide the following for the second life covered.

Surname

First name(s)

Identity number

Gender Male Female

Relationship Spouse Child Other (specify)

SECOND LIFE PERCENTAGE

If you have added a second life you must choose the **percentage** (e.g. 50%, 66.7%, 75% or 100%) of your monthly pension that will continue to be paid to the second life if you pass away before him/her.

Note that your chosen second life percentage will have an impact on your starting monthly pension.

Second life percentage %

COMMISSION

If you are using the services of a Financial Adviser please indicate below:

Non Old Mutual Personal Financial Adviser

* A maximum of 1.71% (including VAT) is allowable.

Adviser/Broker name	Adviser/Broker email	Adviser/Broker contact number	Adviser/Broker code	Adviser/Broker VAT registration number	*Commission % including 14% VAT
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OR

Old Mutual Personal Financial Adviser

** A maximum of 1.5% (VAT not permissible) is allowable.

Adviser name	Adviser email	Adviser contact number	Adviser code	Adviser branch name	**Commission % excluding 14% VAT which is not to be added
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ACKNOWLEDGEMENT

By completing and submitting this request for a Fund Select Annuity Quotation, I acknowledge that Member Support Services may access my membership record (including salary information).

SIGNATURES

Name

Signature

Date



Old Mutual is a Licensed Financial Services Provider