OLD MUTUAL SUPERFUND RETIREMENT BENEFIT CLAIM FORM

You have come to an exciting point in your life, where you have to make important decisions about your future, including how you will be investing your retirement savings.

To ensure that you are fully equipped to make the important decision associated with this life-changing event, please familiarise yourself with the following:

- Read the step-by-step SuperFund Retirement Guide which highlights the options that are available to you at retirement from your employer visit www.oldmutual.co.za/SuperFund/RetiringMembers
- Read about the benefits of the Old Mutual Fund Select Annuity offered by SuperFund on preferential terms to all retiring members (refer to the member guides) and obtain a quotation by:
 - 1) consulting with your financial adviser (if you make use of one),
 - 2) calling 0860 388 873 or emailing fundselect@oldmutual.com, or
 - 3) by completing the quotation request form available at www.oldmutual.co.za/SuperFund/RetiringMembers.

COUNTDOWN TO RETIREMENT

Now that you are well informed about your options at retirement, you can start counting down to your retirement.

Six months to retirement	Three months to retirement	Six weeks to retirement
You should: notify your Employer and Old Mutual SuperFund of your approaching retirement and request your latest retirement benefit value by calling 0860 20 30 40. Note that your retirement benefit value can also be accessed via the secure member website and on the mobile site.	You should: Find out more about Deferred Retirement and Fund Select Annuity which are offered by Old Mutual SuperFund; Speak to a qualified financial adviser about your options at retirement.	 You should ensure that: Your Employer has forwarded your exit documents, or your election to defer retirement to Old Mutual; Old Mutual has your tax registration number; You select the type of annuity (or combination of annuities) that best suits your needs.
One month to retirement	Retirement! Your big day!	

You should by now:

 Have made an election to defer retirement from Old Mutual SuperFund,

OR

If you choose to annuitise;

- Have requested your final quotation;
- Have arranged for the purchase of your annuity and;
- Have completed and signed the application form for your preferred annuity product (or combination of annuities).

 If you choose to defer your retirement, you will remain invested and your savings will keep growing. You will receive a welcome letter shortly after, confirming your membership in SuperFund Deferred Retirement, with further information on your investment and benefits.

OR

If you chose to annuitise you should receive your:

- Cash lump sum, if you have selected one (subject to the required tax clearance being obtained from the Receiver of Revenue) and;
- First pension payout* from the annuity product you have selected, unless you took 100% of the benefit as a cash lump sum (Provident Fund only).

* Provided all the required information and documents have been given to the insurer.



CORPORATE

DO GREAT THINGS EVERY DAY



OLD MUTUAL SUPERFUND RETIREMENT BENEFIT CLAIM FORM

Please complete accurately, using captial letters in blue or black ink. Tick (✓) blocks where appropriate.

Please email or fax the completed form and supporting documents to:

Claims Department Old Mutual SuperFund PO Box 728 Cape Town 8000

Fax 0860 383 848

Email SuperFund@oldmutual.com

THE FOLLOWING SECTION MUST BE COMPLETED BY THE EMPLOYER.

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^{*} Insert the details where the member will be contactable after leaving this employer.

MEMBER EXIT DETAILS Final contributing month D D M M Y Date of retirement | D | D | M | M | Employer R Employee R Amount of final contribution: **TYPE OF RETIREMENT** [indicate the appropriate option with a tick (/)] III-health retirement (attach approval) Late retirement Normal retirement Early retirement **REMUNERATION DETAILS** Final GROSS annual pensionable salary at date of retirement R Final GROSS annual taxable salary at date of retirement R **PRIOR CLAIM** [indicate the appropriate option with a tick ()] Is any Prior Claim payable? If "YES", complete a Prior Claim Form and attach it to this form. **CHECKLIST FOR REQUIRED DOCUMENTATION** [indicate with a tick (/) which documents are attached to this form] Original Certified means that a Commissioner of Oaths, Justice of the Peace, Postmaster or Police Official, including the rank, name and force number, confirms the certification of a document. The certified document is to be original. Annuity application form (stating the proposal number) Prior claim form and relevant supporting documentation (if applicable) Original certified copy of member's identity document Authorised approval from employer for III-health early retirement Original certified copy of spouse's identity document (if applicable) **DECLARATION BY PARTICIPATING EMPLOYER** the undersigned. hereby certify that all particulars furnished in this form and accompanying documentation are true and correct. Signed on behalf of employer **OFFICIAL** COMPANY STAMP Designation

THE FOLLOWING SECTION MUST BE COMPLETED BY THE RETIRING MEMBER.

WHAT ARE MY OPTIONS AT RETIREMENT FROM EMPLOYMENT?

Postpone payment of retirement benefit by porting to SuperFund Deferred Retirement.

- You can postpone your retirement from SuperFund and remain invested until a date of your choosing.
- Your savings will continue growing in a cost effective solution that gives you investment choice and flexibility.

Claim your retirement benefit and retire from SuperFund

D M M Y Y Y

Pension Fund

- You can take a maximum of one-third of your Member Account Balance in cash and use the remainder to purchase an annuity from a registered insurer; or
- You can purchase an annuity from a registered insurer using your full Member Account Balance. (if your total retirement benefit is R247 500 or less, the total benefit may be taken in cash): or
- You can transfer your entire Member Account Balance to an approved Retirement Annuity Fund

Provident Fund

- You can take your full Member Account Balance in cash; or
- You can take any portion of your Member Account Balance in cash and use the remainder to purchase an annuity from a registered insurer; or
- You can purchase an annuity from a registered insurer using your full Member Account Balance; **or**
- You can transfer your entire Member Account Balance to an approved Retirement Annuity Fund

Some important information

- The decision whether to claim or to postpone the payment your retirement benefit should not be taken lightly, as you need to ensure that your provide for your financial security during retirement.
- All options elected must be in terms of the Rules of the Fund and it is advisable to consult a Financial Adviser to assist you in making the right choices
 best suited to your own personal needs and circumstances. If you do not have your own Financial Adviser, contact 0860 388873 (Sharecall) or email
 superfundannuity@oldmutual.com, and a member support service consultant will put you in contact with an accredited financial adviser.

BENEFIT PAYMENT OPTIONS (Options must be elected in terms of the rules of the Fund)

Please complete the relevant section pertaining to the Fund that you are retiring from.

SUPERFUND DEFERRED RETIREMENT - When electing to defer the payment of your benefit, your retirement savings remain invested and will continue growing in a cost effective solution. You have the freedom to choose when you want to receive your benefit, all you need to do is inform Old Mutual that you want to retire from SuperFund.

OLD MUTUAL FUND SELECT ANNUITY - When electing full or partial purchase of annuities, you have the option of electing the Old Mutual Fund Select Annuity, which has been endorsed by the trustees of the SuperFund and designed to meet the investment and income needs of the majority of members when they retire. It provides a pension for life with increases related to the rising cost of living and will be at corporate rates not usually available to retiring individuals.

For more information on SuperFund Deferred Retirement and Fund Select Annuity, please refer to the SuperFund Retirement Guide and the member guides which are found at www.oldmutual.co.za/SuperFund/RetiringMembers.

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