

# 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](http://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](mailto:fundselect@oldmutual.com), or
  - 3) by completing the quotation request form available at [www.oldmutual.co.za/SuperFund/RetiringMembers](http://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  |
|---|---|--|
| <p><b>You should:</b></p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>  | <p><b>You should:</b></p> <ul style="list-style-type: none"> <li>• Find out more about Deferred Retirement and Fund Select Annuity which are offered by Old Mutual SuperFund;</li> <li>• Speak to a qualified financial adviser about your options at retirement.</li> </ul>  | <p><b>You should ensure that:</b></p> <ul style="list-style-type: none"> <li>• Your Employer has forwarded your exit documents, or your election to defer retirement to Old Mutual;</li> <li>• Old Mutual has your tax registration number;</li> <li>• You select the type of annuity (or combination of annuities) that best suits your needs.</li> </ul> |
| One month to retirement   | Retirement! Your big day!   |  |
| <p><b>You should by now:</b></p> <ul style="list-style-type: none"> <li>• Have made an election to defer retirement from Old Mutual SuperFund,</li> </ul> <p><b>OR</b></p> <p>If you choose to annuitise;</p> <ul style="list-style-type: none"> <li>• Have requested your final quotation;</li> <li>• Have arranged for the purchase of your annuity and;</li> <li>• Have completed and signed the application form for your preferred annuity product (or combination of annuities).</li> </ul> | <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p><b>OR</b></p> <p>If you chose to annuitise you should receive your:</p> <ul style="list-style-type: none"> <li>• Cash lump sum, if you have selected one (subject to the required tax clearance being obtained from the Receiver of Revenue) and;</li> <li>• 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).</li> </ul> <p><small>* Provided all the required information and documents have been given to the insurer.</small></p> |  |



**CORPORATE**

**DO GREAT THINGS EVERY DAY**

Please complete accurately, using capital 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.**

### PARTICIPATING EMPLOYER BUSINESS DETAILS

#### Contact person's details

Name of employer

Telephone number Code  No.

Cellphone number

Email address

Contact branch

### PARTICIPATING EMPLOYER SCHEME DETAILS

Scheme code

Member's Old Mutual reference number

### MEMBER'S PERSONAL DETAILS

Title  Surname

First names

Identity number  Date of birth

Income tax number  (compulsory where member has worked in South Africa)

Passport number  (where no South African ID number is available)

Country of issue of passport

Telephone number\* Code  No.  Cellphone number

Email address\*

**Residential address**

Unit number  Complex name

Street number

Street name

Suburb

City/Town  Code

**Postal address** (complete only if different from residential address)

Code

\* Insert the details where the member will be contactable after leaving this employer.



