



RECOGNITION OF TRANSFER

Recognition of Transfer between Pension, Provident and Retirement Annuity Funds as defined in Section 1 of the Income Tax Act (including transfer of Preservation Funds)

1. FUNDDetails:

Name of transferring Fund

Registration no

SARS approval no

PENSION

PROVIDENT

RETIREMENT ANNUITY

DEFINED BENEFIT FUND

DEFINED CONTRIBUTION FUND

2. MEMBER'S DETAILS:

Title

Initials

Surname

Full Name/s

ID no

Contact no

Gender

 M F

Date of withdrawal from transferring Fund

Pensionable service date

3. DETAILS OF TRANSFERRED BENEFIT:

Gross Benefit

Less Housing Loan

Amount to be Transferred

Details of any portion of Gross Benefit not being transferred

Total of member's own contributions without interest not previously allowed as a deduction from taxable income if the transferring Fund is an approved Pension Fund

Details of any portion of Gross Benefit not being transferred

In terms of instructions received from or on behalf of the member, the Benefit must be transferred as follows:

Initial

4A. BANKING DETAILS:

Name of account holder

Name of bank

Accountno

Account type

Branch name

Branchno

Member's reference no (if applicable)

4B. CONTACT DETAILS:

Title

Initials

Surname

Full name/s

Company

Designation

Contact no

Email

Physical Address

Code

Postal Address

Code

4C. STATEMENT ON BEHALF OF RECEIVING FUND:

If any request is received to deal with the benefit as set out in section 1.B in any manner other than that set out in section 1.B, including any request to cancel the transfer to the receiving Fund, such request shall not be implemented by the receiving Fund without prior written consent of the transferring Fund.

Signature (obo transferring Fund)

Company Stamp

Date

