

# FundsAtWork Umbrella Funds

## Divorce order claim form by non-member spouse

Member number

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**The following documents must accompany this application**

- A certified copy of the divorce order.
- A certified copy of the complete settlement agreement.
- A certified copy of member's ID/ Passport.
- A certified copy of the non-member spouse's bank statement not older than three months (no ATM or internet statement will be accepted) or a cancelled cheque.
- A certified copy of the non-member spouse's ID/ Passport.

### Section 1: Fund and employer details

Type of fund	Pension fund <input type="checkbox"/>	Provident fund <input type="checkbox"/>
Name of fund		
Name of employer		

### Section 2: Member details

Title	<input type="text"/>	Initial/s	<input type="text"/>	First name	<input type="text"/>
Surname	<input type="text"/>				
Date of birth	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
RSA ID	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Identity number	<input type="text"/>	
Telephone - work	<input type="text"/>			Fax	<input type="text"/>
Telephone - home	<input type="text"/>			Cellphone number	<input type="text"/>
Email address	<input type="text"/>				

### Section 3: Non-member spouse details

Title	<input type="text"/>	Initial/s	<input type="text"/>	First name	<input type="text"/>
Surname	<input type="text"/>				
Date of birth	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
RSA ID	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Identity number	<input type="text"/>	
Residential address	<input type="text"/>				
Postal address	<input type="text"/>				
Income tax number	<input type="text"/>				
Tax Office	<input type="text"/>				
Telephone - work	<input type="text"/>			Fax	<input type="text"/>
Telephone - home	<input type="text"/>			Cellphone number	<input type="text"/>
Email address	<input type="text"/>				

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## Section 4: Withdrawal details and options

If you belong to the pension fund, complete the pension fund option.  
 If you belong to the provident fund, complete the provident fund option.  
 If you belong to both, complete both the pension and provident fund options.  
 Cash withdrawals are subject to income tax.

<b>Pension Fund</b>	
<input type="checkbox"/>	take the whole benefit in cash;
<input type="checkbox"/>	transfer the whole benefit to an approved pension fund, approved pension preservation fund or approved retirement annuity fund;
<input type="checkbox"/>	take a portion of the benefit in cash and transfer the balance to an approved pension fund or approved retirement annuity fund; Indicate the rand amount/percentage you want to withdraw in cash R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	transfer a portion of the benefit to an approved retirement annuity fund and the balance to an approved pension preservation fund. Indicate the rand amount/percentage you want to transfer to the approved retirement annuity fund R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> %

<b>Provident Fund</b>	
<input type="checkbox"/>	take the whole benefit in cash;
<input type="checkbox"/>	transfer the whole benefit to an approved pension fund, approved provident fund, approved pension preservation, approved provident preservation or approved retirement annuity fund;
<input type="checkbox"/>	take a portion of the benefit in cash and transfer the balance to an approved pension fund, approved provident fund or approved retirement annuity fund; Indicate the rand amount/ percentage you want to withdraw in cash R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	transfer a portion of the benefit to an approved pension preservation fund or approved retirement annuity fund and the balance to an approved provident preservation fund. Indicate the rand amount/ percentage transfer to the approved retirement annuity fund R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> %

## Section 4a: Bank account details (if cash was selected)

Name of account holder (ex-spouse)	<input type="text"/>															
Bank name	<input type="text"/>															
Account type	Current/Cheque <input type="checkbox"/>	Savings <input type="checkbox"/>	Transmission <input type="checkbox"/>													
Account number	<input type="text"/>										Branch code	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>

## Section 4b: FNB Smart Account (complete if you do not have an existing bank account)

Would you like Momentum FundsAtWork to open a First National Bank (FNB) bank account on your behalf?  Yes  No

I voluntarily authorise Momentum FundsAtWork to open a bank account on my behalf with FNB and warrant that I have read, understood and accepted the content in Appendix A. The money in the FNB account will only be made available once I have produced the required documentation. No liability in favour of Momentum FundsAtWork will arise as a result of the withdrawal benefit being transferred to the account held in my name.

Once the FNB account has been opened, Momentum FundsAtWork will notify you via sms.

The closest FNB Branch to me is

<b>Member's signature</b>	<input type="text"/>	Date	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
<b>Witness 1</b>	<input type="text"/>	Date	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
<b>Witness 2</b>	<input type="text"/>	Date	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	-	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

