

Children's Education Benefit Claim Form

Complete in **BLOCK LETTERS** or tick where applicable

Please use this form when you are claiming a children's education benefit for the first time. For future payments, please use GR505 the Children's Education Benefit update form.

Please complete separate forms for each child.

A - Scheme details

Scheme name	<input type="text"/>	Scheme ref.	<input type="text"/>
Employer name	<input type="text"/>		
Employer branch name or no.	<input type="text"/>		

B - Member details

Member's title	<input type="text"/>	Initials	<input type="text"/>
First name/s	<input type="text"/>		
Surname	<input type="text"/>		
RSA ID	Yes <input type="checkbox"/>	No <input type="checkbox"/>	ID / Passport no <input type="text"/>
Passport country of origin	<input type="text"/>		
Date of birth	<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"/>	Member ref. no.	<input type="text"/>
Gender	Male <input type="checkbox"/>	Female	<input type="checkbox"/>
Marital Status	Married <input type="checkbox"/>	Single	<input type="checkbox"/>
	Divorced	<input type="checkbox"/>	Widowed <input type="checkbox"/>
			Permanent Life Partner <input type="checkbox"/>
Date of death	<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"/>		
Cause of death	<input type="text"/>		

C - Child's details

First name/s	<input type="text"/>		
Surname	<input type="text"/>		
Date of birth	<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"/>		
RSA ID	<input type="text"/>		
Is the child currently in full time education?	Yes <input type="checkbox"/>	No	<input type="checkbox"/>
If yes, current school grade	<input type="text"/>		
or			
Name of tertiary education course	<input type="text"/>		
Current year of study	<input type="text"/>		

D - Educational institution details (if applicable)

Name of educational institution

Name of educational institution

Banking details of educational institution

Name of account holder

Name of bank

Account number Branch no.

Account type Current/cheque Savings Transmission

Contact person for accounts

Title Initials

First name/s

Surname

Street address

Postal code

Postal address

Postal code

Email

Telephone number

E - Fees details (to be completed by educational institution)

Name of educational institution

Registration number

Type of institution – please tick all boxes that apply

Private Public/government No-fee school

Pre-primary school High school University of technology

Primary school University College

Other (please specify)

Physical address

Postal code

Tuition fee structure

	Monthly	Annual	
If monthly, what is the monthly tuition fee amount	<input type="text"/>	<input type="text"/>	
If monthly, number of months payable in a year	<input type="text"/>	<input type="text"/>	
If annual, what is the annual tuition fee amount	<input type="text"/>	<input type="text"/>	

Current fee account breakdown

Current fee details	Amount
Total fees due for the year	<input type="text"/>
Amounts already paid	<input type="text"/>
Bursaries or scholarships received	<input type="text"/>
Exemptions received	<input type="text"/>
Discounts received	<input type="text"/>
Outstanding balance due	<input type="text"/>

When was the last fee payment received?

If the total fees for the year include any costs other than tuition, please specify the amounts.

Costs included in total fees	Amount
Admin fees	
Registration fees	
After care	
Extra lessons	
Books or equipment	
Extra murals (please provide details)	
Other costs not for tuition	

If any amounts were paid towards fees after the child's parent passed away, please provide details below.

Date of payment	Amount	Paid by

Any other notes or comments about the fees due.

F - Nominated beneficiary detail

Please complete the details of the person who will receive the education booster benefit and education bonus benefit (if any) on the child's behalf.

First name/s

Surname

RSA ID Yes No ID / Passport no

Passport country of origin

Street address

Postal code

Telephone number Mobile number

Email

Relationship to child Parent Guardian Other (please specify)

Banking details of nominated beneficiary

Name of account holder

Name of bank

Account number Branch no.

Account type Current/cheque Savings Transmission

G - Alternative contact details

Please provide the details of another person who can be contacted if the nominated beneficiary is no longer able to look after the child or can't be traced by Momentum.

First name/s	<input type="text"/>		
Surname	<input type="text"/>		
RSA ID	Yes <input type="checkbox"/>	No <input type="checkbox"/>	ID / Passport no <input type="text"/>
Passport country of origin	<input type="text"/>		
Street address	<input type="text"/>		Postal code <input type="text"/>
Telephone number	<input type="text"/>	Mobile number	<input type="text"/>
Email	<input type="text"/>		
Relationship to child	<input type="checkbox"/> Parent	<input type="checkbox"/> Guardian	<input type="checkbox"/> Other (please specify) <input type="text"/>

H - Employer declaration

I hereby declare that the information furnished above is true and correct. I further indemnify Momentum Metropolitan Life Limited against any action or liability that may arise as a result of any error or incorrect information supplied with this form.

I agree that Momentum Corporate may process all information that I provide on this form. I understand that the information will be processed in accordance with the Protection of Personal Information Act, 2013 and Momentum Corporate's strict policies on protecting the confidentiality of my personal information.

I agree that Momentum Corporate may use my personal information to provide and administer retirement fund investment and insurance products and share my personal information with Momentum Corporate's partners and contracted service providers, who are legally bound to protect the information.

[Click here](#) to read the full consent document.

Signature	<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Capacity	<input type="text"/>																		

Notes

The following supporting documentation must be submitted:

- Copy of child's unabridged birth certificate
- Copy of nominated beneficiary's identity document
- Copy of the nominated beneficiary's current bank statement
- Copy of current fee account from school or tertiary education institution showing the full amount of fees due for the year and amounts already paid
- Confirmation of banking details of educational institution on a letterhead
- Details of any bursaries or exemptions received

Send this form and all the supporting documents to: momentumcorporateclient@momentum.co.za

When you sign this form by inserting a digital signature it confirms that the information provided is true and correct.

Options to sign the form:

1. Print out the form, sign and scan it and send it back via Momentum.
2. Place your scanned signature in the signature block.
 - Store your scanned signature in a safe place on your computer.
 - Select the 'comments' tab from your menu in Adobe.
 - Select the 'add stamp' icon.
 - Select custom stamps.
 - Create custom stamps.
 - You can now browse and upload your signature to save it as a custom stamp under 'sign here' in Adobe.
 - You can now go back to your 'stamps' icon and select 'sign here' and select your saved signature.
 - Place it in the document and save the document.

When you want to print the form to complete by hand you can turn off the field highlights by selecting the "highlight existing fields" on the top right hand corner of your screen.

Momentum Metropolitan Life Limited

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