

Beneficiary nomination form
for paid up funeral benefit

Policy number

To be completed by a beneficiary on the death of a member who had a paid up funeral benefit provided by the employer

Please complete the fields provided. Use the tab key to move from one field to the next.

Section 1: Details of the paid up policy holder

Former scheme name

Policy holders title

InitialsFirst name(s)

Policy holders surname

Date of birth

D

D

-

M

M

-

Y

Y

Y

Y

RSA ID

Yes

No

ID/passport numberPassport country of origin

Status

Single

Married

Divorced

Separated

Widow/widower

Permanent life partner

Contact number

Email address

Section 2: Nominated beneficiary details

The funeral benefit will be paid to the beneficiary you nominated. You may nominate any natural person (human being) to receive the benefit that will be paid from the paid up funeral policy if you pass away. This could include your spouse or partner, any person that is financially dependent on you, or any person that you want to receive your benefit. You may also nominate a legal entity like a charity, a business or a trust for example, but you may not nominate your employer. Consider nominating the person who will arrange and pay for your funeral, who should ideally be 18 or older.

I nominate the following person or entity to receive the funeral benefit if I pass away.

Full name(s) and surname (for a natural person) or full registered name (for a legal entity)	Title	ID or passport number (for a natural person) or registration number (for a legal entity)	Date of birth	Contact number of beneficiary	Relationship (eg spouse, partner, daughter, son, mother, friend)

If the beneficiary I nominated above passes away before me, or is unable to receive the benefit, or doesn't want to accept the benefit, I nominate the following person or entity to receive it instead.

Full name(s) and surname (for a natural person) or full registered name (for a legal entity)	Title	ID or passport number (for a natural person) or registration number (for a legal entity)	Date of birth	Contact number of beneficiary	Relationship (eg spouse, partner, daughter, son, mother, friend)

Notes:

- Where you have nominated a legal entity, you don't need to fill in the fields for title, date of birth or relationship.
- When you provide contact numbers for your beneficiary, make sure you provide their numbers, not yours, so that we can reach them if you pass away.
- If there is any additional information that you would like us to know about, add this information in the field below.

Section 3: Member's signature

I declare that I understand that this beneficiary nomination cancels all previous nominations, if any, that I have made for the paid up funeral.

I agree that Momentum Corporate may process all information that I provide on this form. I understand that the information will be processed in line 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 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 Momentum's privacy notice.](#)

Signed at

Member's signature

Date

D

D

-

M

M

-

2

0

Y

Y

If your circumstances change, for example you get married or divorced, or have a child, or a nominated beneficiary dies, and you want to change your beneficiary details, you must complete a new beneficiary nomination form. You may also log on to our website at www.momentum.co.za and change your beneficiary nomination electronically, if you have the facility.

Options to sign the form:

1. Print out the form, complete it and sign it. Then scan it and sent it by email to momentumcorporateclient@momentum.co.za.
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.
 - Send the document by email 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.

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.