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Section 3: Details of transferred benefit (continued)

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

The following restrictions or conditions apply in respect of the benefit being transferred

Penalty interest in terms of Section 13A(7)

Total protected provident fund value as at date of election:

NOTE:

Protected provident fund value is, in respect of members younger than 55 on 1 March 2015, the capital value as at 1 March 2015 plus investment return to date of transfer, and in respect of members older than 55 on 1 March 2015, the capital value plus investment return as at date of transfer.

Section 4: Details of contact person at transferring fund

Title	<input type="text"/>	Initial/s	<input type="text"/>
First name	<input type="text"/>		
Surname	<input type="text"/>		
Company	<input type="text"/>		
Telephone - work	<input type="text"/>		
Fax - work	<input type="text"/>		
Cellphone number	<input type="text"/>		
Email address	<input type="text"/>		
Postal address	<input type="text"/>		
	<input type="text"/>		Postal Code <input type="text"/>
Signed at	<input type="text"/>		

Signature (on behalf of transferring fund)	<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"/>
						2	0					

Surname and initials of member

Section 5: Statement on behalf of transferring fund

The amount to be transferred as set out in above will be paid by means of electronic bank transfer as soon as:

- This recognition of transfer form is returned fully completed to the contact person shown in Section 4 above; and
- The necessary authority to effect such a transfer has been received from the revenue authorities.

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Receiving Fund

Section 6: Details of receiving fund

Initials & surname of member	<input type="text"/>		
Full name of fund	<input type="text"/>		
Registration number	<input type="text"/>		
SARS approval number	<input type="text"/>		
Type of fund	Pension <input type="checkbox"/>	Provident <input type="checkbox"/>	Retirement annuity <input type="checkbox"/>
Member's application no or other reference	<input type="text"/>		

Section 7: Banking details of receiving fund

Payee name	<input type="text"/>		
Bank name	<input type="text"/>		
Branch	<input type="text"/>	Branch Code	<input type="text"/> - <input type="text"/> - <input type="text"/>
Type of account	Current <input type="checkbox"/>	Savings <input type="checkbox"/>	Transmission <input type="checkbox"/>
Account number	<input type="text"/>		
Client's reference no (if applicable)	<input type="text"/>		

Section 8: Details of contact person at receiving fund

First name	<input type="text"/>		
Surname	<input type="text"/>		
Company	<input type="text"/>		
Telephone - work	<input type="text"/>		
Fax - work	<input type="text"/>		
Cellphone number	<input type="text"/>		
Email address	<input type="text"/>		
Postal address	<input type="text"/>		
	<input type="text"/>	Postal Code	<input type="text"/>

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Section 9: Statement on behalf of receiving fund

The transfer benefit, as set out in section 3 will be applied for the benefit of the person specified in section 2, in the fund as specified in section 6. If any request is received to deal with the benefit as set out in section 3 in any manner other than that set out in section 3, 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.

Signed at

Signature
(on behalf of receiving fund)

Date

D	D	-	M	M	-	2	0	Y	Y
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Surname and initials of member

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 email to clientcontactcentre@momentum.co.za or fax it to Fax +27 (0)12 675 3970.
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.