

FundsAtWork Umbrella Funds Instruction and indemnity for payment to third party bank account

Member number

Name of fund

Name of participating employer

Employer group code

PF number 12/8/

Please fill in this form in the fields provided. Use the tab key to move from one field to the next.

Section 1: Member's instruction

Section 37A(4) of the Pension Funds Act allows a retirement fund to pay a member's or beneficiary's benefit into the bank account of a third party, if they can give sufficient proof that they are not able to open a bank account. Payment to the third party will be regarded as a payment made directly to the member or beneficiary and the fund will have discharged its duties in relation to that member or beneficiary.

I, (full name)

ID/Passport number

hereby confirm the following:

1. A benefit in the amount of R is due to me from the above Fund as a result of my withdrawal from the Fund on - -

2. I am unable to open a bank account for the following reasons:

3. I hereby request the Fund to pay my benefit from my pension / provident fund due to me into the bank account of (name of third party)

ID/Passport number

(Please attach a copy of ID document of third party).

Section 2: Member's declaration

I confirm that the Fund may proceed with the payment of my benefit as indicated and that the Fund will not be liable for any damages suffered (including but not limited to direct, indirect or consequential loss that may arise) as a result of paying my benefit to the third party nominated by me.

Member's full name

Member's signature

Date - - 20

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Section 3: Third party declaration

I, (full name)

ID/Passport number

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hereby agree to receive the benefit of

(the member of the Fund)

on his/her behalf as agreed between ourselves.

Third party full name

Relationship to member

Third party signature

Date

D	D	-	M	M	-	2	0	Y	Y
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Progress on payment of the claim can be followed up by contacting the Payment Call Centre 0860 65 75 85.

Fax the completed form to 012 675 3970 or email to clientcontactcentre@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 email to clientcontactcentre@momentum.co.za or fax it to +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.