

Momentum Corporate Preservation Funds

Proposed transfer of business between preservation funds (Form H)

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

**Section 14(8): scheme for the proposed transfer of business from the _____
Preservation fund (transferor fund) (12/8/_____) to the _____
Preservation fund (transferee fund) (12/8/_____) as at _____**

1. Transfer requested by member

Title	<input type="text"/>	Initial/s	<input type="text"/>	First name	<input type="text"/>
Surname	<input type="text"/>				
RSA ID	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Identity / Passport number <input type="text"/>		
Passport country of origin	<input type="text"/>				
Member number	<input type="text"/>				

2. The transfer will be effected in terms of the following rules:

Transferor fund:	<input type="text"/>	Transferee fund:	<input type="text"/>
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3. The associated share of fund in terms of the rules and the effect of the transfer on the membership of the transferor fund at the effective date of the transfer are as follows:

	Number transferring:	Share of fund	Number remaining after the transfer:
Active members		R	Variable
Deferred pensioners		R	
Unclaimed benefits		R	
		Total: R	

4. The table below reflects the amounts relating to the transfer and the rule(s) of the fund in terms of which the inclusion of the member surplus account and reserve accounts are based:

Account:	Balance prior to transfer:	Amount transferred:	In terms of Rule:
Member surplus account:			
Contingency reserve accounts:			
A			
B			
C			
Total			

5. The total amount that will be transferred at the effective date is R _____ and this amount is constituted as follows:

Share of Fund	R
Surplus and Reserves	R
Total	R

6. The assets to be transferred will be increased or decreased with fund return from the effective date of the transfer to the date of final settlement.

7. Where housing loans are transferred, the details thereof, or an explanation as to the extent and nature of the liability, are as follows:

8. Where any enforceable court orders in respect of the members transferring form part of the liabilities transferred, the details are as follows:

Certification by the Transferor Fund:

9. We, the board of the transferor fund, certify that:

- 9.1 this transaction is exempt from the provisions of section 4(1) as set out in paragraph 29.1.4 of Directive 6 issued in terms of section 33A;
- 9.2 the transfer value accords full recognition to the rights and reasonable benefit expectations of the transferring member;
- 9.3 the rights and reasonable benefit expectations of the remaining members are not adversely affected;
- 9.4 the provisions of the rules of the transferor fund have been complied with;
- 9.5 the assets and liabilities will be transferred within 180 days of the effective date of transfer;
- 9.6 the assets to be transferred will be increased or decreased with fund return from the effective date to the date of final settlement;
- 9.7 the member will not become entitled to a cash refund, except for payment of tax payable to SARS, and
- 9.8 the transferor fund will keep full records of this transfer and will present these to the Registrar upon request or inspection.

10. We, duly authorised by the board of the transferor fund, declare that the information in paragraphs 1 to 9 above is, to the best of our knowledge and belief, correct and complete. We undertake to duly complete and sign Form J in recognition of the transfer and refer it to the transferee fund within 14 working days of date of final settlement.

11. 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.

<div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Chairperson / authorised member of the board</p> <p>Full name in print</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Date <input type="text" value="D"/> <input type="text" value="D"/> - <input type="text" value="M"/> <input type="text" value="M"/> - <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/></p>	<div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Principal Officer</p> <p>Full name in print</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Date <input type="text" value="D"/> <input type="text" value="D"/> - <input type="text" value="M"/> <input type="text" value="M"/> - <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/></p>
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Certification by the Transferee Fund:

12. We, the board of the transferee fund, certify that:

- 12.1 this transaction is exempt from the provisions of section 4(1) as set out in paragraph 29.1.4 of Directive 6 issued in terms of section 33A;
- 12.2 the rights and reasonable benefit expectations of the existing members in the transferee fund are not adversely affected by this transfer;
- 12.3 the benefits of the transferring member will be applied reasonably and equitably in the transferee fund;
- 12.4 the provisions of the rules of the transferor fund have been complied with; and
- 12.5 the transferee fund will keep full records of this transfer and will present them to the Registrar upon request or inspection.

13. We, duly authorised by the board of the transferee fund, declare that the information in paragraphs 2 and 11 above is, to the best of our knowledge and belief, correct and complete. We accept the transfer on the terms set out above and undertake to complete Form J upon receipt from the transferor fund and return a completed and duly signed copy within 14 working days of receipt thereof.

14. 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.

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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 fawpreservationfund@momentum.co.za, call 086 055 5572 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.