

# Momentum Corporate Preservation Funds

## Section 14(8): Recognition of transfer (Form J)

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

**Section 1: For the \_\_\_\_\_ Preservation Fund (12/8/\_\_\_\_) (Transferor Fund) in respect of 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"/>				

- The date of final settlement is \_\_\_\_\_ and the amount paid on this date is R \_\_\_\_\_
- I certify that:
  - the transfer value was increased or decreased with fund return from the effective date of transfer to the date of final settlement; and
  - a duly completed and signed copy of this form will be forwarded to the transferee fund within 14 working days from the date of final settlement.

3. On behalf of the transferor fund:

Full name in print	<input type="text"/>
Designation	<input type="text"/>
Administrator	<input type="text"/>
Telephone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>

<b>Signature</b>	<input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - 2 0 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
------------------	----------------------	--

**Section 2: For the \_\_\_\_\_ Preservation Fund (12/8/\_\_\_\_) (Transferee Fund) In respect of member: \_\_\_\_\_**

- Banking details of the transferee fund / receiving entity (where the assets were deposited):
 

Account holder	<input type="text"/>
Name of bank	<input type="text"/>
Branch Code	<input type="text"/>
Reference number	<input type="text"/>
Amount	<input type="text"/>

Date of deposit    -    -

- I certify that:
  - the transfer value will be applied in the manner specified in Form H of this transfer; and
  - a duly completed and signed copy of this form will be forwarded to the transferor fund within 14 working days from the date of receipt thereof.

---

## Section 2: (Continued)

3. 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.

4. On behalf of the transferee fund:

Full name in print

Designation

Administrator

Telephone

Fax

Email

Signature

Date

D	D	-	M	M	-	2	0	Y	Y
---	---	---	---	---	---	---	---	---	---

---

**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](mailto: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.