

Momentum Corporate Preservation Funds Divorce order claim form by non-member spouse

Member number

| | | | | | | | | | | | | | | | | | | | |
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The following documents must accompany this application

- A certified copy of the divorce order.
- A certified copy of the complete settlement agreement.
- A certified copy of the non-member spouse's ID / Passport (if you have an identity card, please submit a copy of front and back of card).
- A certified copy of the non-member spouse's bank statement not older than three months (no ATM or internet statement will be accepted) or a cancelled cheque.

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

Section 1: Fund details

Type of fund

Momentum Corporate Pension Preservation Fund

Momentum Corporate Provident Preservation Fund

Section 2: Member details

Title Initial/s First name

Surname

Date of birth - -

RSA ID Yes No Identity / Passport number

Passport country of origin

Postal address

Residential address

Telephone - work Fax

Telephone - home Cell phone

Email address

Tax number Tax Office

Section 3: Non-member spouse details

Title Initial/s First name

Surname

Date of birth - -

RSA ID Yes No Identity / Passport number

Passport country of origin

Postal address

Residential address

Telephone - work Fax

Telephone - home Cell phone

Email address

Section 4: Withdrawal details and options

If you belong to the Pension Preservation Fund, complete the Pension Preservation Fund option.

If you belong to the Provident Preservation Fund, complete the Provident Preservation Fund option.

If you belong to both, complete both the Pension Preservation and the Provident Preservation Fund options.

Cash withdrawals are subject to income tax.

| Pension Preservation Fund | |
|---------------------------|---|
| <input type="checkbox"/> | transfer the whole withdrawal benefit to the Momentum Corporate Pension Preservation Fund (not necessary to complete section 4a and 4b); |
| <input type="checkbox"/> | transfer the whole withdrawal benefit to another approved pension fund, approved provident fund, approved pension preservation fund, an approved provident preservation fund or approved retirement annuity fund (complete section 4b); |
| <input type="checkbox"/> | take a portion of the withdrawal benefit in cash and transfer the balance to the Momentum Corporate Pension Preservation Fund (complete section 4a); Indicate the rand amount / percentage you want to withdraw in cash R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | take a portion of the withdrawal benefit in cash and transfer the balance to another approved pension fund, approved provident fund or approved pension preservation fund, approved provident preservation fund or approved retirement annuity fund (complete section 4a and 4b1); Indicate the rand amount / percentage you want to withdraw in cash R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | transfer a portion of the withdrawal benefit to an approved retirement annuity fund and the balance to an approved pension preservation fund (complete section 4b1 and 4b2); Indicate the rand amount / percentage you want to transfer to the approved annuity fund R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | take the whole withdrawal benefit in cash (complete section 4a). |

| Provident Preservation Fund | |
|-----------------------------|--|
| <input type="checkbox"/> | transfer the whole withdrawal benefit to the Momentum Corporate Pension Preservation Fund (not necessary to complete 4a and 4b); |
| <input type="checkbox"/> | transfer the whole withdrawal benefit to the Momentum Corporate Provident Preservation Fund (not necessary to complete 4a and 4b); |
| <input type="checkbox"/> | transfer the whole withdrawal benefit to another approved pension fund, approved provident fund, approved pension preservation, approved provident preservation or approved retirement annuity fund (complete section 4b); |
| <input type="checkbox"/> | take a portion of the withdrawal benefit in cash and transfer the balance to the Momentum Corporate Pension Preservation Fund (complete section 4a); Indicate the rand amount / percentage you want to withdraw in cash R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | take a portion of the withdrawal benefit in cash and transfer the balance to the Momentum Corporate Provident Preservation Fund (complete section 4a); Indicate the rand amount / percentage you want to withdraw in cash R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | take a portion of the withdrawal benefit in cash and transfer the balance to another approved pension fund, approved provident fund, approved pension preservation fund, approved provident preservation fund or approved retirement annuity fund (complete section 4a and 4b); Indicate the rand amount / percentage you want to withdraw in cash R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | take the whole withdrawal benefit in cash (complete 4a). |

| Split the withdrawal benefit between: | |
|---------------------------------------|---|
| <input type="checkbox"/> | approved pension fund R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | approved provident fund R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | approved pension preservation fund R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | approved provident preservation fund R <input type="text"/> or <input type="text"/> % |
| <input type="checkbox"/> | approved retirement annuity fund R <input type="text"/> or <input type="text"/> % |

Section 4a: Bank account details (if cash was selected)

| | | | |
|------------------------------------|---|----------------------------------|--|
| Name of account holder (ex-spouse) | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account type | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Account number | <input type="text"/> | | Branch code <input type="text"/> - <input type="text"/> - <input type="text"/> |

Section 4b: Transfer details (if transfer was selected)

1.

Note:

- A transfer of benefits to another approved fund will not attract any tax.
- While this claim is being processed, the benefit will be placed in Momentum FundsAtWork's bank account in order to eliminate the possibility of the benefit being reduced due to volatile market conditions.

| | | | |
|--------------------------|---|----------------------------------|--|
| Name of receiving fund | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account number | <input type="text"/> | | |
| Type of account | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Branch | <input type="text"/> | Branch Code | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Financial adviser's name | <input type="text"/> | | |
| Financial adviser's code | <input type="text"/> | | |
| Telephone work | <input type="text"/> | | |
| Fax work | <input type="text"/> | | |
| Email address | <input type="text"/> | | |

2.

| | | | |
|--------------------------|---|----------------------------------|--|
| Name of receiving fund | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account number | <input type="text"/> | | |
| Type of account | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Branch | <input type="text"/> | Branch Code | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Financial adviser's name | <input type="text"/> | | |
| Financial adviser's code | <input type="text"/> | | |
| Telephone work | <input type="text"/> | | |
| Fax work | <input type="text"/> | | |
| Email address | <input type="text"/> | | |

3.

| | | | |
|--------------------------|---|----------------------------------|--|
| Name of receiving fund | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account number | <input type="text"/> | | |
| Type of account | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Branch | <input type="text"/> | Branch Code | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Financial adviser's name | <input type="text"/> | | |
| Financial adviser's code | <input type="text"/> | | |
| Telephone work | <input type="text"/> | | |
| Fax work | <input type="text"/> | | |
| Email address | <input type="text"/> | | |

4.

| | | | |
|--------------------------|---|----------------------------------|--|
| Name of receiving fund | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account number | <input type="text"/> | | |
| Type of account | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Branch | <input type="text"/> | Branch Code | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Financial adviser's name | <input type="text"/> | | |
| Financial adviser's code | <input type="text"/> | | |
| Telephone work | <input type="text"/> | | |
| Fax work | <input type="text"/> | | |
| Email address | <input type="text"/> | | |

Section 4b: Transfer details (if transfer was selected) continued

5.

| | | | |
|--------------------------|---|----------------------------------|--|
| Name of receiving fund | <input type="text"/> | | |
| Bank name | <input type="text"/> | | |
| Account number | <input type="text"/> | | |
| Type of account | Current/Cheque <input type="checkbox"/> | Savings <input type="checkbox"/> | Transmission <input type="checkbox"/> |
| Branch | <input type="text"/> | Branch Code | <input type="text"/> - <input type="text"/> - <input type="text"/> |
| Financial adviser's name | <input type="text"/> | | |
| Financial adviser's code | <input type="text"/> | | |
| Telephone work | <input type="text"/> | | |
| Fax work | <input type="text"/> | | |
| Email address | <input type="text"/> | | |

Section 5: Declaration by non-member spouse

I full names

hereby declare that:

- all particulars furnished in this form are true and correct;
- payment by electronic transfer shall constitute full and final settlement, discharging Momentum of its liability in terms of the Rules of the Fund;
- the benefit payment options available to me, as well as the tax implications thereof, have been explained to me in full; and
- after seeking relevant financial advice, I confirm that the choices indicated here are my final instructions and acknowledge that I am aware that the benefit paid will be subject to the Fund Rules and relevant legislation.

Signed at

| | | |
|------------------------------------|----------------------|---|
| Non-member spouse signature | <input type="text"/> | Date <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - 2 0 <input type="text"/> <input type="text"/> |
|------------------------------------|----------------------|---|

Please note that the administrator will only process the claim if the divorce order complies with Section 7(8) of the Divorce Act, read together with Section 37D of the Pension Fund Act.

Completed form to be faxed to 012 675 3970 or emailed to fawpreservationfund@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 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.