

# Momentum Corporate Provident Preservation Fund retirement form for members who did not opt-in to the two-pot system

Member number

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**Attach the following documents:**

- A copy of your ID/passport (if you have an identity card, submit a copy of front and back of the card).
- A copy of your bank statement not older than three months (no ATM or internet statement will be accepted).

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

## Section 1: Member details (member completes this section)

Title	<input type="text"/>	Initial(s)	<input type="text"/>
First name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Date of birth	<input type="text"/>	-	<input type="text"/>
ID/passport number	<input type="text"/>		
Passport country of origin	<input type="text"/>		
Cellphone number	<input type="text"/>	Alternative number	<input type="text"/>
Email address	<input type="text"/>		
Residential address	<input type="text"/>		
Unit number	<input type="text"/>	Complex (if applicable)	<input type="text"/>
Street number	<input type="text"/>	Street/farm name	<input type="text"/>
Suburb/district	<input type="text"/>		
City/town	<input type="text"/>	Postal code	<input type="text"/>
Postal address	<input type="text"/>		
Unit number	<input type="text"/>	Complex (if applicable)	<input type="text"/>
Street number	<input type="text"/>	Street/farm name	<input type="text"/>
Suburb/district	<input type="text"/>		
City/town	<input type="text"/>	Postal code	<input type="text"/>
Income tax number	<input type="text"/>		
Date of retirement	<input type="text"/>	-	<input type="text"/>

## Section 2: Court order deductions (member completes this section)

Is there a maintenance order where the Fund is ordered to deduct a maintenance amount from your retirement savings in favour of a maintenance claimant? If yes, please provide a copy of the maintenance order.

Yes  No

Is there a divorce order where the Fund is ordered to deduct a portion from your retirement savings in favour of a non-member spouse? If yes, please provide a copy of the divorce order and the settlement agreement, if applicable, and complete the divorce order form.

Yes  No

## Section 3: Retirement benefit options

Buy an annuity with my full retirement savings (complete section 3b).

Take as cash the whole or any portion of my retirement savings and buy an annuity with the balance, if any (complete sections 3a and 3b).

Amount or percentage of your savings component you want to take as cash

R  or  %

### Section 3a: Existing bank account details if cash was selected

Name of account holder (member)	<input type="text"/>		
Account number	<input type="text"/>		
Name of bank/building society	<input type="text"/>		
Branch name	<input type="text"/>	Branch code	<input type="text"/>
Account type	<input type="checkbox"/> Current/cheque	<input type="checkbox"/> Savings	<input type="checkbox"/> Transmission

### Section 3b: Insurer's details to buy an annuity

Name of insurer	<input type="text"/>		
Contact person	<input type="text"/>		
Contact number	<input type="text"/>		
Email address	<input type="text"/>		
Account holder	<input type="text"/>		
Account number	<input type="text"/>		
Bank name	<input type="text"/>		
Branch name	<input type="text"/>	Branch code	<input type="text"/>
Account type	<input type="checkbox"/> Current/cheque	<input type="checkbox"/> Savings	<input type="checkbox"/> Transmission
Financial adviser's name	<input type="text"/>		
Cellphone number	<input type="text"/>		
Email address	<input type="text"/>		

While we process your retirement claim, we will place your retirement benefit in Momentum's bank account to eliminate the possibility of it reducing because of volatile market conditions.

### Section 4: Declaration by member

I,  (full names)

declare that:

- All the information provided in this form is true and correct.
- I understand that if my bank details are incomplete or incorrect, the payment of any lump sum retirement benefit will be delayed.
- Payment by electronic transfer will constitute full and final settlement, discharging the Fund and its administrator, Momentum Corporate, of liability in terms of the rules of the Fund.
- The retirement options available to me, as well as the tax implications, have been explained to me in full.
- After looking for the relevant financial advice, the choices indicated in this form are my final instructions and I acknowledge that I am aware that my retirement option will be subject to the rules of the Fund and relevant legislation.

I indemnify the Fund and its administrator, Momentum Corporate, against any claim, loss and/or damage that may arise from executing the choices in this form.

I agree that the Fund and its administrator, Momentum Corporate, may process all information that I provide on this form. I understand that the information will be processed in line with the Protection of Personal Information Act, 2013, and the Fund's and Momentum Corporate's strict policies on protecting the confidentiality of my personal information.

[Click here](#) to read the Fund's Privacy Notice.

<input type="text"/>	Signed at
	<input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Member's signature</b>	<b>Date</b>

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**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).
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.