

Momentum Corporate Preservation Funds Withdrawal form

Member number

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Please make sure that you understand the Rules of the Momentum Corporate Preservation Fund, as well as the respective benefits and tax implications before you complete this form. We recommend that you ask your financial adviser for assistance.

Please attach the following documents:

- A copy of the member's ID / passport (if you have an identity card, please submit a copy of front and back of card).
- If applicable, the new member application form.
- A copy of the member's bank statement not older than three months 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

Please complete the details of the fund that you currently belong to.

Type of fund Momentum Corporate Pension Preservation Fund Momentum Corporate Provident Preservation Fund

Date of withdrawal

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Section 2: Member details

Title Initial/s

First name

Surname

Date of birth

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RSA ID Yes No Identity / Passport number

Passport country of origin

Postal address

Postal Code

Residential address

Postal Code

Telephone - work Fax

Telephone - home Cell phone

Email address

Tax number Tax Office

Section 3: Withdrawal details and options

Partial Full

Portfolios	Withdrawal amount (R)	Percentages (%)	Cash	Transfer

Note:
• A cash withdrawal paid from a preservation fund is subject to tax.
• Only one withdrawal benefit is payable from this fund. Any portion of the benefit left in the Fund will become payable on the earlier of death or retirement.

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

Name of account holder (member)	<input type="text"/>		
Name of financial institution	<input type="text"/>		
Account type	Current <input type="checkbox"/>	Transmission <input type="checkbox"/>	Savings <input type="checkbox"/>
Account number	<input type="text"/>		
Branch name	<input type="text"/>	Branch code	<input type="text"/> - <input type="text"/> - <input type="text"/>
Member's signature	<input type="text"/>	Date	<input type="text"/> ^D <input type="text"/> ^D - <input type="text"/> ^M <input type="text"/> ^M - 2 0 <input type="text"/> ^Y <input type="text"/> ^Y

Section 3b: Transfer details (if transfer was selected)

Name of receiving fund	<input type="text"/>		
Name of financial institution	<input type="text"/>		
Account type	Current <input type="checkbox"/>	Transmission <input type="checkbox"/>	Savings <input type="checkbox"/>
Account number	<input type="text"/>		
Branch name	<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	<input type="text"/>
Email address	<input type="text"/>		

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's bank account in order to eliminate the possibility of the benefit being reduced due to volatile market conditions.

Section 4: Disinvestment effective date

Momentum will start the disinvestment process of your retirement savings account within 7 days of receiving the withdrawal notification. If you want your retirement savings account to stay invested until the effective withdrawal date, please tick the box below.

Yes, my retirement savings account should stay invested until the effective date of withdrawal.

Section 5: Declaration by member

I full names

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.

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.

Signed at	<input type="text"/>		
Member's signature	<input type="text"/>	Date	<input type="text"/> ^D <input type="text"/> ^D - <input type="text"/> ^M <input type="text"/> ^M - 2 0 <input type="text"/> ^Y <input type="text"/> ^Y

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.