

## Protection of Personal Information Disclosure

**Why Personal Information is required:** Sanlam Life Insurance Limited ("Sanlam Life"), a subsidiary of Sanlam Limited, will process and protect your personal information as required by relevant laws and the Constitution of the Republic of South Africa ("RSA"). The personal information requested in this form, which may include special personal information is being collected and will be processed for the following purposes:

- underwriting and providing accurate and effective insurance cover and related value-added services;
- member communication;
- market research and statistical analysis;
- verification of the personal information provided;
- to comply with all legal and regulatory requirements, including applicable codes of conduct;
- for operational and administrative processes to protect Sanlam Life's interests.

Failure to provide the mandatory information will prejudice your insurance cover.

**Changing and correcting Personal Information:** You have the right to:

- Request a copy of your personal information as processed by Sanlam Life;
- Ask for an update and/or correction of your personal information;
- Lodge a complaint with the Information Regulator.

Sanlam Life may charge an administrative fee subject to prior notice of any such cost before executing the request for a copy of your personal information.

**Other parties that may receive the Personal Information:**

- We may share your personal information within Sanlam Limited and/or with other service providers where required for any of the purposes listed above, or with third parties where Sanlam Life is lawfully required to do so.
- We may send your personal information to service providers outside the RSA for storage or further processing on Sanlam Life's behalf. We will not send your information to a country that does not have information protection legislation similar to that of the RSA, unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of personal information in accordance with the Protection of Personal Information Act, 2013.

For more information, please refer to the [Sanlam Group Privacy Notice](#).

**Member**  
Quick Access  
Self Service



**Get in touch with your  
retirement information**

**Member Support:**

You can update your contact details by registering and logging into our member portal here:

**Web:** <https://cp.sanlam.co.za> **or Email:** [SCClientCare@sanlam.co.za](mailto:SCClientCare@sanlam.co.za) **or Tel:** 086 122 3646

### Important Information

- If you are retiring, complete **Sections A, C and D**.
- If you are withdrawing your benefit, complete **Sections: A, B and D**.
- As a member of the Sanlam Unity Umbrella Fund, you have access to free Retirement Benefit Counselling available via our Individual Member Support (IMS) team.
- Contact Individual Member Support (IMS) on **080 0111 956** or send an e-mail to [IMS@sanlam.co.za](mailto:IMS@sanlam.co.za) for support, guidance or referral to a Financial Adviser.
- Please e-mail the completed documentation to: [sanlamumbrellafund@sanlam.co.za](mailto:sanlamumbrellafund@sanlam.co.za)

### SECTION A: Member's personal details

Title			
First name(s)			
Surname			
RSA identity number*		<i>*Compulsory</i>	
If not RSA, passport number*		<i>*Compulsory (if RSA ID not used above)</i>	
Date of birth (dd/mm/yyyy)		<i>*Compulsory if Passport used</i>	
Income tax number			
Postal address			Postal Code
Residential/physical address (if different to the above)			Postal Code
Contact number(s)	Cell phone		Alternative
Email			

### Banking details

Account holder's name			
Bank name			
Account number			
Type of account			

#### Please Note:

- Payments cannot be made to credit card or bond accounts, third parties or split into different accounts

### Important Information

- If you are **retiring**, complete **Sections A, C and D**.
- If you are **withdrawing**, complete **Sections: A, B and D**.

### SECTION B: Withdrawal Claim

Members may withdraw at any time up to age 70, whereafter a retirement benefit becomes applicable.

*Please select one of the payment options below*

If you select option 1 or 2 below, please provide the application forms of the applicable receiving fund separately.	Provident Fund
<b>1. Transfer full benefit to a Pension Fund, Provident Fund, Retirement Annuity Fund or a Preservation Fund (e.g. the Sanlam Plus Preservation Fund).</b> <ul style="list-style-type: none"> <li>• Complete application for membership.</li> </ul>	<input type="checkbox"/>
<b>2. Pay a portion of the benefit in cash and transfer the balance to a Pension Fund, Provident Fund or a Preservation Fund (e.g. the Sanlam Plus Preservation Fund).</b> <ul style="list-style-type: none"> <li>• Complete application for membership.</li> </ul> <p><b>Please Note:</b></p> <ul style="list-style-type: none"> <li>• Indicate the % or Rand amount to be paid in cash.               <ul style="list-style-type: none"> <li>○ The remaining amount will be the gross amount before tax.</li> </ul> </li> <li>• The balance will be transferred to the receiving fund.</li> </ul>	<input type="checkbox"/>
	%
	<b>OR</b>
	<b>R</b>
<b>3. Pay the full benefit in cash</b> Please Note: The benefit will be subject to tax.	<input type="checkbox"/>

If you have chosen to transfer the benefit to another fund, please provide the details of the fund

Name of approved Fund	
Administrator of the Fund	
Contact number	
Email address	

**SECTION C: Retirement Claim**

Members may retire from the age of 55 onwards.

*Please select one of the payment options below*

If you select option 2,3, 4, 5 or 6 below, please provide the application forms of the applicable receiving fund separately.	Provident Fund
<b>1. Pay a portion of the benefit in cash and transfer the balance to purchase a compulsory annuity.</b> <ul style="list-style-type: none"> <li>• The maximum cash portion allowed is one-third of your benefit</li> <li>• Indicate the % or Rand amount to be paid in cash (The remaining amount will be the gross amount before tax)</li> </ul> <p><b>Please Note:</b> The balance will be transferred to the chosen annuity</p>	<input type="checkbox"/>  <div style="text-align: right;">%</div> <p style="text-align: center;"><b>OR</b></p> <div style="text-align: left;">R</div>
<b>2. Transfer full benefit to a preservation fund</b>	<input type="checkbox"/>
<b>3. Transfer full benefit to retirement annuity</b>	<input type="checkbox"/>
<b>4. Pay full benefit in cash</b>	<input type="checkbox"/>

**Important Information**

- Retirement Reform Changes (known as "T-Day") came into effect on 1 March 2021. This means that from 1 March 2021, your member share will consist of two portions: a vested member share and a non-vested member share.
- Your **vested member share** (all your savings as of 28 February 2021 plus interest thereon) may be taken in cash.
- Your **non-vested member share** (all your savings from 1 March 2021 plus interest thereon) - if the benefit is less than R247 500, you may take the full benefit in cash. If the benefit amount is more than R247 500, then only one-third of the benefit can be taken in cash. The balance must be used to buy a pension

If you have chosen to transfer the benefit to another fund, please provide the details

Name of approved Fund	
Administrator of the Fund	
Contact number	
Email address	

**SECTION D: Declaration****Declaration by the member**

I, the undersigned member, hereby confirm that:

- The information given herein is true and correct.
- I am the account holder of the bank account provided.
- I instruct and authorise Sanlam to pay all monies due to me in accordance with my instructions above.
- I furthermore confirm that I am withdrawing from my retirement fund and that I have chosen the option as indicated on this form, for the payment of my benefit due to me from the fund.
- I confirm that I have been made aware that retirement benefits counselling services are available to me.

Member's Signature		Date (dd/mm/yyyy)	
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