

DEPENDANTS INFORMATION AND BENEFICIARY NOMINATION

Please complete in **BLOCK LETTERS** using **black or blue ink**.

This information is needed to assist the Trustees in paying the lump sum benefits due in the event of your death before retirement.

PLEASE NOTE THE FOLLOWING:

The benefits are required, in terms of section 37C of the Pension Funds Act, to be paid by the Trustees of the Fund to your dependants (as defined by the Act) and/or the persons you have nominated (a summary of these provisions is provided overleaf for your convenience).

You may nominate any persons to receive any part of the benefit payable. This includes your dependants as well as persons unrelated to you and not dependent on you for support. The trustees, in exercising their discretion, may override your nomination if they consider it appropriate.

The Trustees have a duty in terms of the Act to apportion the benefits equitably between your dependants and nominees **at their discretion**. Your nomination will serve to assist the Trustees in making these decisions and also help the Trustees trace your dependants.

You may indicate whether you wish the benefit to be payable to a trust, although the final decision rests with the Trustees.

As your circumstances may change, it is recommended that you review your nomination from time to time. You may alter your nomination at any time by notifying the Fund in writing or by completing a Beneficiary Nomination Form and returning it to the Bursar/Secretary at your School.

As a guide to the Trustees, the following persons are my dependants either through a legal relationship (example marriage) or due to the fact that I support them:

Full name and address of dependant	Date of birth	Relationship to member

I nominate the following persons to receive the benefits payable on my death:

Full name and address of nominee	Date of birth	Relationship to member	Share (%) of benefit

NOTE: Total proportion to equal 100%.

In the event of any of the above persons dying before me and who are not regarded as my dependants in terms of the Pension Funds Act, I direct that their shares as indicated above, be allocated proportionately to the remaining nominees subject always to the provisions of the Pension Funds Act.

Member's full name

Staff number

Signature

Date