



Who must complete this form, and when?

This form must be completed by HR on the **withdrawal** (including resignation, retrenchment, or dismissal) or **retirement** of a Fund member in cases where the member has not yet elected a particular option*, or where the member is not available to complete the required termination documentation.

Where members **do not exercise a choice regarding their DBPF benefit, they will automatically become a deferred pensioner in the DBPF. This default preservation option does not mean that they are locked in by not making an election; it just means that their benefit will be treated as a deferred benefit rather than an unpaid or unclaimed benefit. Members will still have the option to withdraw (provided that they have not retired from service and are under the age of 60 when they make their election) or retire from the DBPF (provided that they are over the age of 50 when they make their election) at any date into the future.*

SECTION A: RELEVANT EVENT

This information is for a:
(Please select)

RETIREMENT			WITHDRAWAL THROUGH:		
Early <i>Please attach an official letter from the business unit manager approving such retirement.</i>	Normal	Retrenchment <i>If the member is aged 50+, the cost centre for the remittance of the retrenchment enhancement:</i> 	Resignation	Retrenchment	Dismissal

SECTION B: MEMBER'S DETAILS

Title (Mr, Ms, etc.)		Initials	
Surname			
First names			
Identity number		Gender	☐ Male ☐ Female
Date of birth		Marital status	
Passport number (non-RSA residents)		Country of issue	
Operation name		Policy number	
Date employed		Date joined Fund	
Last working day			
Contact details	Tel (home)		Cell
Email			
Postal address			Code
Physical address			Code
Revenue office where tax last paid		Tax number (compulsory)	

SECTION C: OTHER CONSIDERATIONS

Was the member a member of NUM at retirement?	YES	NO
Did the member belong to the Defined Benefit (DB) section of the Fund on 31 July 2006?	YES	NO
Did the member have any group service outside the Republic of South Africa ? If yes, please attach an official letter from the employer confirming the foreign service. Such a member must, where possible, be made aware that the Fund is compelled in such cases to apply for tax directives from both the South African Revenue Service and, where relevant, the revenue service of the country/countries outside South Africa in which the member had service.	YES	NO
Did the member have a housing loan/bond for which the employer provided security/guarantee ? If yes, please attach a copy of the signed agreement. Amount to be recovered from member's Fund Credit: Payment to be issued in favour of:	YES	NO

SECTION D: CONFIRMATION OF ACCOMPANYING DOCUMENTS

Letter from business unit manager for retrenchments and early retirements

Copy of the member's ID document

If member is divorced, copy of final divorce order and settlement, if not yet submitted to the Fund

SIGNATURE: HR OFFICER

Signature		Full names	
		Date	

The information disclosed in this document will be treated as confidential and will only be used for the purposes for which it is intended in terms of applicable legislation. The De Beers Pension Fund (the Fund) has developed a Privacy Policy which covers how the Fund collects, uses, discloses, transfers, and stores members' personal information. Please visit the Fund's website to view the Privacy Policy.