



Who must complete this form?

The member should complete this form.



By when should this form be returned?

The member must submit this form to the Fund when an approximate calculation is required.

SECTION A: MEMBER'S PERSONAL DETAILS

Surname		Initials	
Gender		Policy number	
ID number		Date of birth	
Email address		Cellphone no.	
Marital status	Single	Married	Divorced
			Separated
			Widowed
Spouse's date of birth		Spouse's gender	
Approximate savings pot withdrawal / retirement / withdrawal date to be used for the purpose of this approximate calculation			

SECTION B: FOREIGN SERVICE

Please note the following with regards to foreign service and withdrawal:

Where an employee has service in South Africa, Namibia or any other country:

- The De Beers Pension Fund (the Fund) must apply for a tax directive from the South African Revenue Service on all savings pot withdrawal and retirement benefits.
- For withdrawals, if a member has service in Namibia, the Fund must apply for a tax directive from the Namibian Inland Revenue Office as well.
- Members who have 100% Namibian service will not be allowed to withdraw from their savings pot.
- The Fund will apply the directives as received by the various revenue offices.
- The foreign service as confirmed by your employer will be used to determine the split in terms of your monthly pension (if purchasing a pension from the Fund).

The Fund has an obligation to conform to these requirements and is not allowed any discretion in this regard.

Please indicate if you have any service that was performed outside of South Africa to date: Yes No

If "Yes", the Fund will contact your HR department to obtain a breakdown of your foreign service.

This can result in a delay in receiving the approximate calculations.

SECTION C: TYPE OF APPROXIMATE CALCULATION (PLEASE TICK)

1. SAVINGS POT APPROXIMATE VALUE

2. WITHDRAWAL (TERMINATION DUE TO RESIGNATION/DISMISSAL/RETRENCHMENT WITHDRAWAL)

3. RETIREMENT - LIFE ANNUITY AND LIVING ANNUITY

A range of life and living annuity approximate calculations will be provided. Should you require additional calculations, please contact the Fund.

ARE YOU BEING RETRENCHED? Yes No *If "yes", the Fund will contact the employer for confirmation.*

PLEASE INDICATE WHAT PORTION OF THE FOLLOWING POTS YOU WOULD LIKE TO COMMUTE FOR A LUMP SUM

	Rand amount		Percentage of benefit
VESTED LUMP SUM POT (100% may be commuted)		OR	
VESTED ANNUITY POT (up to 33.33% may be commuted)		OR	
SAVINGS POT (100% may be commuted)		OR	

PLEASE NOTE:

In terms of Default Regulations as well as the Fund's communication strategy, after providing you with approximate calculations, the Fund will contact you to discuss your retirement or withdrawal options and answer any questions you may have.

SECTION D: MEMBER'S SIGNATURE

I, _____ (member's full names) authorise the De Beers Pension Fund
to provide my approximate calculations to the following email address: _____

Member's signature

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 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 should you require additional information.