

De Beers Pension Fund – Defined Benefit Fund
DB6.1: Retirement Documentation Covering Letter

SECTION A – MEMBER'S PERSONAL DETAILS									
SURNAME									
INITIALS				TITLE					
FIRST NAMES				GENDER					
ID NUMBER				DATE OF BIRTH					
PASSPORT NUMBER (for Non-RSA residents)				PASSPORT COUNTRY OF ISSUE					
MARITAL STATUS				POLICY NUMBER					
OPERATION NAME				LAST WORKING DAY					
DATE JOINED FUND				DATE EMPLOYED					
E-MAIL ADDRESS**									
**Where an e-mail address is supplied, all future Fund communication will be directed to the e-mail address supplied. Ideally, this should be your personal e-mail address and not the e-mail address which applied during your employment.									
TELEPHONE NUMBER (work)				CELLPHONE NUMBER					
TELEPHONE NUMBER (home)				FAX NUMBER					
POSTAL ADDRESS									
				POSTAL CODE					
PHYSICAL ADDRESS									
				POSTAL CODE					
ALTERNATE CONTACT DETAILS E.G. FAMILY MEMBER				TELEPHONE NUMBER					
REVENUE OFFICE WHERE TAX LAST PAID				TAX NUMBER (Compulsory)					
ETHNIC ORIGIN	BLACK	☐	WHITE	☐	COLOURED	☐	ASIAN	☐	
WAS THE EMPLOYEE A MEMBER OF NUM AT DATE OF RETIREMENT?					YES	☐	NO	☐	
SECTION B – TYPE OF RETIREMENT (TICK)									
Please note, if you do not exercise a choice below or do not make a valid election regarding your DBPF benefit, you will automatically become a deferred pensioner in the DBPF. This default preservation option does not mean that you are locked-in if you do not make an election, it just means that your benefit will be treated as a deferred benefit rather than an unpaid or unclaimed benefit. You will still have the options below available to you at any date into the future									
a. NORMAL RETIREMENT	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)								
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)								
b. EARLY RETIREMENT – members retiring between ages 50 and 55 (Pension discounted with increases)	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)								
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)								

Please initial

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SECTION B – TYPE OF RETIREMENT (TICK) (continued)		
c. EARLY RETIREMENT – members retiring between ages 55 and 60 (Pension discounted with increases)	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)	
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)	
d. EARLY RETIREMENT – members retiring between ages 55 and 60 (Pension undiscounted with increases from age 60)	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)	
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)	
e. RETRENCHMENT EARLY RETIREMENT - members retrenched between ages 50 and 55 (Pension discounted with increases)	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)	
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)	
f. RETRENCHMENT EARLY RETIREMENT - members retrenched between ages 50 and 55 (Pension undiscounted with increases from age 55)	PRE-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Larger lump sum, smaller spouse and children's pensions following pensioner's death)	
	POST-COMMUTATION SPOUSES'/CHILDRENS' PENSION (Smaller lump sum, larger spouse and children's pensions following pensioner's death)	
g. ILL-HEALTH RETIREMENT	FULL ILL-HEALTH –	
	PARTIAL ILL-HEALTH	
h. PURCHASE OF ANNUITY FROM 3 RD PARTY IN RSA ON RETIREMENT	(Members considering this option should contact the Fund for further details) Rule	
i. TAX FREE TRANSFER TO A RETIREMENT ANNUITY FUND OR A PENSION PRESERVATION OR PROVIDENT PRESERVATION FUND IN RSA (No lump sum may be taken if this option is elected)	Members considering this option should contact the Fund for further details)	

SECTION C – TICK TO CONFIRM THAT THE FOLLOWING DOCUMENTS ARE ATTACHED		
1	FINAL YEAR'S EARNINGS FORM (DB6.2)	
2	FIVE YEAR EARNINGS FORM (DB9)	
3	COMMUTATION/BANKING ADVICE FORM (DB6.4)	
4	UNDERGROUND SERVICE RECORD (DB6.6)	
5	MARRIAGE CERTIFICATE	
6	MEMBER'S BIRTH CERTIFICATE	
7	SPOUSE'S BIRTH CERTIFICATE	
8	CHILDRENS' BIRTH CERTIFICATES	
9	SWORN DECLARATION (DB3)	
10	DEATH BENEFIT BENEFICIARY NOMINATION FORM (DB2)	
11	OPERATION MANAGER'S LETTER CONFIRMING RETIREMENT / RETRENCHMENT	

SECTION E – INDICATE EMPLOYEES SERVICE IN THE FOLLOWING COUNTRIES				
Did the member have any group service outside the Republic of South Africa	YES	☐	NO	☐
If yes, a letter from the employer on the letterhead of the employer must be attached confirming the foreign service.				
Where an employee has service in South Africa, Namibia, Botswana or any other country, please ensure that the employee has read and understands the following:				
- The De Beers Pension Fund will apply for a tax directive from the South African Revenue Service as well as the Namibian Inland Revenue Office. - The De Beers Pension Fund has an obligation to conform to these requirements and is not allowed any discretion in this regard.				

Please initial

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SECTION F – CERTIFICATE BY EMPLOYER OF MEMBER'S OUTSTANDING DEBT				
DOES EMPLOYEE HAVE A HOUSING LOAN/BOND FOR WHICH THE COMPANY PROVIDED SECURITY/GUARANTEE (IF YES, A COPY OF THE SIGNED AGREEMENT IS TO BE ATTACHED)	YES	☐	NO	☐
AMOUNT TO BE RECOVERED FROM MEMBER'S PENSION MONIES	R			
PAYMENT TO BE ISSUED IN FAVOUR OF:				

DECLARATION BY MEMBER
I HEREBY ACKNOWLEDGE THAT: - I have received approximate calculations from the De Beers Pension Fund outlining the retirement options available to me. - I have consulted a Certified Financial Planner and or tax advisor (if required) to make my decision. - I confirm that I was provided with access to Retirement Benefit Counselling from the Fund, either in written or verbal format (or both), prior to making my election as set out herein. - I confirm that in making the elections indicated in this form, I have not obtained any financial advice from the Fund, or from any of its officers or employees, or from anyone acting or purporting to act as an agent of the Fund. I confirm that I have made my own election and have obtained independent financial advice where this was required and appropriate - I confirm that I have read through and understand all the contents of this form and agree with the information provided on this form by me and my employer. - 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 accordingly 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 should you require additional information

SIGNATURES					
MEMBER	NAME		WITNESS	NAME	
	DATE			DATE	
	SIGNATURE			SIGNATURE	
HR OFFICER	NAME				
	DATE				
	SIGNATURE				