

Instruction by a non-member spouse for payment of pension interest upon divorce

Notes:

- Retirement planning is important and you are advised to seek independent financial advice when making financial decisions.
- Please note that an administration fee will be levied against your divorce benefit in respect of each fund that has to make payment.
- Where a lump sum benefit or a portion thereof is payable, a tax directive will be obtained from SARS. Payment can only be made once a tax directive has been obtained. In the event that a tax directive is declined for reasons beyond the control of GQM you will need to contact SARS directly to resolve the matter.

A. MEMBER'S PERSONAL PARTICULARS

Fund Name			
Title and Initials		Full Names and Surname	
ID / Passport Number		Date of Birth	
Contact Number (Home)	()	Contact Number (Cell)	()
E-mail address			
Home address	Postal address		

B. NON-MEMBER'S SPOUSE'S PARTICULARS

Title and Initials		Full Names and Surname	
ID / Passport Number		Date of Birth	
Contact Number (Home)	()	Contact Number (Cell)	()
E-mail address		Tax Reference No	
Date of Marriage		Date of Divorce	
Home address	Postal address		

Divorce Claim Instruction

Please select ONE of the payment options below:

1. Pay full benefit in cash (The benefit will be subject to tax) ☐
2. Transfer full benefit to a Pension Fund, Provident Fund, Retirement Annuity fund or a Preservation Fund (Please provide the application forms of the receiving fund separately) ☐

Note: Transfers to an approved fund will be tax-free is subject to obtaining a tax directive from SARS.

Name of Approved Fund		Administrator	
Contact Number		E-mail address	
FSCA Fund Registration Number			

Banking details:

Name of Bank		Account Holder	
Account Number		Branch Code	

Savings ☐ Cheque ☐ Transmission ☐

Please note the following:

- Payments cannot be made to credit card or bond accounts
- Payments cannot be made to a third party
- Payments cannot be split into different bank accounts

***Please attach the following;**

- **Proof of bank details (bank statement stamped by the bank (not older than 3 months))**
- **Copy of decree of divorce including orders and settlement agreements**
- **Certified copy of id**

Signature if non-member spouse

Date

Disclosure of information

GQM and the fund understand privacy and the confidentiality of personal information. If required, we may disclose your personal information to 3rd parties. These 3rd parties are insurance and service providers who are involved in the delivery of products or services to you. The same strict confidentiality standards are imposed on 3rd parties. Signing of this form confirms acknowledgement and consent to the above. We will treat personal information with caution and have security measures in place to protect it. The information provided will be used for intended purpose only. Such purposes include fund and related communications. We may also disclose your information:

- Where we have a duty or a right to disclose in terms of law or industry codes;
- Where we believe it is necessary to protect our rights.

Where the person signing this document is someone other than the person whose personal information is being supplied, such signatory confirms that the necessary consent has been obtained to supply personal information and that the information is true and correct.