

## **Request to deduct an additional amount for tax, from the monthly annuity of a pensioner.**

### **Important information before requesting that an additional amount be deducted from the monthly annuity of a pensioner:**

1. A pensioner can request that the GEPF deduct an additional amount for tax, from the monthly annuity he or she is receiving. Typically a pensioner will request this where he or she has other income in addition to the pension he or she is receiving, thus when all income is declared to SARS, the pensioner is in a higher tax bracket, and has to make additional payment to SARS, after assessment.
2. A pensioner must specify the amount to be deducted and paid to SARS monthly, as well as when the deductions must start and end. If no end date is specified, the deduction of the stipulated amount will continue indefinitely;
3. The total amount deducted and paid to SARS will be reflected on the IRP5 issued every year;
4. **Please note that if you have outstanding SARS debt you wish to settle, arrangements must be made with SARS directly – GEPF cannot assist with arrangements to settle outstanding SARS debts and this deduction cannot be used to settle outstanding tax debt.**

### **REQUEST FOR ADDITIONAL TAX DEDUCTION**

#### **1. Pensioner Particulars**

The pensioner particulars are your personal particulars and the pension against which you want the GEPF to make the additional tax deduction.

#### **2. Deduction Particulars**

The deduction particulars are amount you want the GEPF to deduct from your pension on a monthly basis, the date the deductions must start, and the date the deductions must end.

If the end date is left blank, the deductions will run indefinitely.

If you opted for an indefinite deduction and you want to stop the additional deductions or change the amount deducted, please complete and submit a new form reflecting the new amount or the date the deductions must stop.

#### **Required Attachments:**

1. A certified copy of the ID of the pensioner (both sides of your SA ID Card, or your green barcoded ID book.)
2. If the pensioner is not a South African national, a certified copy of his or her valid passport.

\*All certified copies must be certified within the last six months

#### **Submission Instructions:**

1. After completing the form, the original form must be delivered to any GEPF regional office or posted to the GEPF, along with the attachments listed above.
2. Postal Return address:  
Government Employees Pension Fund  
Private Bag X63  
Pretoria  
SOUTH AFRICA  
0001
3. Enquiries may be directed to the GEPF Call Centre: 0800 117669

The GEPF respects privacy and personal information of its members and pensioners and therefore subscribes to the provisions of the Protection of Personal Information Act 4 of 2013. Visit [www.gepf.co.za](http://www.gepf.co.za) to view GEPF Privacy Policy and Privacy statement.