

D) PARTICULARS OF THE TRANSFEEE FUND (Approved External Retirement Fund)

Fund Underwriter																								
Fund Name																								
Fund Registration Number at FSB	12/8																							
SARS Registration Number of Fund	18/20/4																							
POLICY/REFERENCE Number of Client																								

CONTACT PARTICULARS OF THE TRANSFEEE FUND*(NB: These are the contact details as captured on the tax directive application and must correspond with the contact information for the transferee fund as a captured at SARS)*

Tel No									Cell No															
E-Mail																								

BANK PARTICULARS OF TRANSFEEE FUND

Name of Account																								
Bank Name																								
Branch Code					Type of Account:	Cheque	<input type="checkbox"/>	Transmission	<input type="checkbox"/>	Savings	<input type="checkbox"/>													
Branch Name																								
Account Number																								

E) PARTICULARS OF FUND REPRESENTATIVE

Surname																			Initials					
FAIS Registration No																								
Tel No									Cell No															
E-Mail																								

F) PLEASE TAKE NOTE OF THE FOLLOWING IMPORTANT INFORMATION

1. If the rules of the Transferee Fund make provision for a cash withdrawal, it will be limited to one third of the transfer value (interest included) and the balance of the transfer value (interest included) must be utilized for the purchase of any annuity for the member at retirement.
2. In terms of a directive issued by SARS (South African Revenue Services), transfer entitlements under the provisions of the Government Employees Pension Law, 1996, which is transferred to an approved retirement fund, accrues to a member as a lump sum benefit. Accordingly paragraph 6 of the Second Schedule of the Income Tax Act is applicable and the transfer of lump sum benefits will be tax-free, with effect from 1 March 2006.
3. The rules of the GEPF specifically provides for the preservation of pension benefits and as such transfers to Provident Fund, Provident Preservation Fund were not provided for in the GEP Law. Amendments to the SARS legislation allows for lump sum benefits to be transferred tax free to a Pension Fund, Pension Preservation Fund, Provident Fund, Provident Preservation Fund and Retirement Annuity Fund, as from 1 March 2021. As such, GEPF will transfer to such funds if registered and approved by SARS and subject to engagement with SARS.

G) CERTIFICATION OF NON-MEMBER SPOUSE (EX-SPOUSE)**A:**

I _____
the undersigned, declare that all particulars furnished on this form are true and correct and that I have been fully informed of the conditions and implications of my choice.

Signature of Non-Member Spouse

Date Signed

B:

I _____
the undersigned, declare that all particulars furnished on this form are true and correct and that I informed the member of the conditions and implications of his or her choice (including section F of this form) to transfer to an Approved Retirement Fund.

Signature Fund Representative

Date Signed

PLEASE ATTACH THE FOLLOWING DOCUMENTS:

1. Certified ID copy not older than 6 months.
2. Tax number (proof from SARS)

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 to view GEPF Privacy Policy and Privacy statement.