

**Instructions for completing the Nomination Form WP1002:
Nominating a beneficiary to receive a portion of a deceased member or
pensioner's gratuity, should there be a gratuity payable on the death of a
GEPF member or pensioner.**

Important information before completing the Nomination Form:

1. The information you provide regarding a nominee is confidential and the Fund will not disclose any information about your nominations (who you nominated, their relationship to you, or the reasons for your nominations) to anybody else.
2. This form must be completed by a contributing member of the Fund.
A pensioner can also complete the form, but it will only apply to a pensioner who passes away within 5 years of retiring, as this form only applies to the distribution of a gratuity benefit. (Where a pensioner passes away within 5 years of retiring, the 5 year balance is paid as a gratuity to the dependents/nominees of that pensioner)
3. The nominees on this form – along with the dependents of the member or pensioner – will be taken into account when the Fund must distribute the gratuity that becomes payable when a member passes away in service, or if a pensioner passes away within 5 years of retirement.
4. The distribution of a gratuity is done in terms of the rules of the Fund.
This means that the Fund must prioritise dependents based on their circumstances when distributing the gratuity, and may overrule a members' nomination, should the distribution requested on the nomination form, be unfair to anybody who was dependent on the deceased member or pensioner.
5. This form makes provision for 5 beneficiaries – if you have more beneficiaries than 5, please make as many copies of page 2 as you require and add those pages into the document before you hand it in to the GPAA.
6. The nomination form must be fully completed, the nomination must add up to 100%, and all the pages initialled and signed by the member and witnesses, for the nomination to be valid.
If the nomination form is not fully completed and signed, the form and its contents will be totally disregarded.
This means that any of the nominees who does not qualify as a dependent, will not be considered at all when the Fund distributes the gratuity benefit.

Instructions for the completion of the Nomination Form

1. Member particulars

1. Please complete all the fields under this section.
2. Please ensure that your current tax number is provided – old or incorrect tax numbers, or outstanding tax issues can delay the processing of pension benefits indefinitely, should SARS refuse to issue a tax directive.
3. Please ensure that the particulars you provide match those on your ID and with the Department of Home Affairs. If anything needs to be corrected on your ID or marriage certificate or with regard to your marital status, please engage DoHA immediately in order to prevent delays when processing the pension benefits.
4. Please ensure that the Fund always has your current e-mail and cell numbers – the Fund uses these to stay in contact with you.

5. Alternate contact number: This is the number we use if we cannot contact you by cell or e-mail. This number is not mandatory, and if we need to use this number, we will not disclose any of your personal information – it will only be used if all else fails and we must get in contact with you, or somebody who can get a message to you.

2. Beneficiary Particulars

1. The information you provide regarding a nominee is confidential and the Fund will not disclose any information about your nominations (who you nominated, their relationship to you, or the reasons for your nominations) to anybody else.
2. It is very important that you make sure that you have completed the “percentage of benefit” portion for each beneficiary you nominate, and that all the nominations add up to 100% on page 3, otherwise the nomination is invalid.
3. Any person or entity can be nominated as the beneficiary for the member’s pension benefits, but please bear in mind that the Fund is required to overrule your nomination, should it be unfair towards the people who are financially and factually dependant on you.
4. The particulars of the person (or entity) you want to nominate must be completed in full, as well as their relationship to you.
The relationship is very important as it speaks towards dependency.
Please remember the information you provide is confidential, so if there are any special circumstances that you wish to bring to the attention of the Fund, please feel free to attach extra pages detailing the information you want the Fund to take note of.
5. If a nominee is a minor (under the age of 18) the Fund requires the particulars of the guardian to that child, and the relationship between the child and the guardian, on the nomination form. This information is very important should a benefit become payable to that minor, as a minor cannot receive any benefits in own right, but the benefits must be administered by the appointed guardian. Depending on the relationship between the guardian and minor, the benefits may be paid to the guardian to administer on behalf of the minor, or to the Guardians Fund at the Master of the High Court, for administration.
It is very important that this information be current and available to the Fund prior to the death of a member or pensioner, to allow the Fund to contact that guardian when the time comes, and to ensure the child is considered when distributing the gratuity.
*A certified copy of the ID of the guardian is not required for the nomination
6. This form makes provision for 5 beneficiaries – if you have more than 5 beneficiaries, please make as many copies of page 2 as you require and add those pages into the document before you hand it in to the GPAA.

3. Executor of the Estate

1. This section is not mandatory.
2. If you have appointed an executor of your estate in your last Will and Testament, please provide his or her particulars and contact details.
This information is only used in the event that you have no dependants or nominated beneficiaries, or if the Fund requires the assistance of the executor with aspects such as tax numbers or other administrative issues that may arise.

4. Signatures

1. This section is critical! If this section is not completed, the nomination is void!
2. The member must sign or affix his or her signature in the presence of two witnesses.
3. The two witnesses must sign and provide their details in the sections provided.

5. Checklist

1. The checklist is not mandatory but provided as a tool for the member to confirm the nomination is complete and valid

Required attachments:

1. A certified copy of the ID of the member (both sides of your SA ID Card, or your green barcoded ID book.)
2. If the member is not a South African national, a certified copy of his or her valid passport.
3. A certified copy of the ID or passport, or Birth Certificate of each of the nominees.
4. A certified copy of your marriage certificate(s).
5. If an institution is nominated, proof of registration of the entity needs to be provided.

*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 117 669

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.