

Sanlam Beneficiary Fund

Application for fund closure due to death of beneficiary

- The application form is to be completed by the executor or person authorized by the court.
- The completed application and supporting documents must be sent to: lbf@sanlam.co.za

SECTION A: Personal particulars of deceased beneficiary

Membership number:

Date of birth:

Date of death:

Full names and surname:

ID number:

Passport number:

SECTION B: Personal particulars of executor or person authorized by the court

Title:

Date of birth:

Full names and surname:

ID number:

Contact number(s)

Home:

Cell:

E-mail address:

Home address:

Postal code:

SECTION C: Banking details of estate late account or authorized person

Bank:

Branch code:

Account number:

Account type:

SECTION D: Documents to be submitted with the application

Attached

- | | | |
|------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------------|
| 1. Original certified copy of Letter of Executorship (total value of estate >R250 000.00) from the Master of the High Court. | <input type="radio"/> Yes | <input type="radio"/> No |
| 2. Original certified copy of Letter of Authority (total value of estate <R250 000.00) from the Master of the High Court. | <input type="radio"/> Yes | <input type="radio"/> No |
| 3. Original bank statement of estate late account or authorized person - not older than three months. | <input type="radio"/> Yes | <input type="radio"/> No |
| 4. Original certified copy of the Identity Document or Smart ID card (include both sides) of applicant. | <input type="radio"/> Yes | <input type="radio"/> No |
| 5. Original certified copy of death certificate of the beneficiary. | <input type="radio"/> Yes | <input type="radio"/> No |

Signature of applicant

Date

Disclaimer

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx>; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: SCClientCare@sanlam.co.za or call: 086 122 3646.