

**SANLAM PLUS PRESERVATION FUND****SECTION 14 TRANSFER OUT FORM****SECTION A: GENERAL INFORMATION**

- Completed documentation should be returned to Sanlam Umbrella Fund Administration via Fax @ 012 683 3981 or emailed to: [sanlampreservation@sanlam.co.za](mailto:sanlampreservation@sanlam.co.za)
- Please complete all the relevant sections of this application.

Sanlam Plus Pension Preservation Fund Sanlam Plus Provident Preservation Fund 

		Included	
1	Completed application form (pages 1 – 2 of this form)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2	Original Certified Copy of your South-African bar-coded ID or valid passport	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3	Copy of receiving fund's application form signed by the investor	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**SECTION B: MEMBER DETAILS****Personal Details**

Membership no.			
First name:			
Title:	Mr	Initials:	
Surname:			
ID Number:			
Income Tax Number:			
Postal Address:			
Home Address:			
Telephone Number (home):		Telephone Number (work):	
Cell Number:			
E-mail Address:			

## Divorce

Has a divorce order ever been noted against this fund?

Yes

No

If yes, please provide the following details:

Name of ex-spouse:

Postal Address:

Home Address:

Daytime contact telephone number

## SECTION C: MEMBER DECLARATION

I the undersigned confirm the following and declare that:

- The information given herein is true and correct,
- I have taken financial advice or assert that I have a good understanding of investments and do not need the services of a financial adviser,

Signature of member: \_\_\_\_\_ 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](mailto:SCClientCare@sanlam.co.za) or call: 086 122 3646.