

Sanlam Beneficiary Fund

Application for fund closure by major

Note:

- The beneficiary has to complete this application.
- The completed form and supporting documents must be sent to: lbf@sanlam.co.za

Please indicate instruction type:

Take benefit in cash

Remain invested with a monthly income (if applicable, please specify the amount):

Do you need any investment advice?

Yes

No

SECTION A: Personal particulars of applicant (beneficiary)

Title:

Date of birth:

Full names and surname:

ID number:

Contact number(s)

Home:

Cell:

E-mail address:

Home address:

Postal code:

Please indicate your current occupation:

Studying

Working

Unemployed

SECTION B: Banking details of beneficiary

Name of bank:

Branch code:

Account number:

Account type:

SECTION C: Personal particulars of guardian

Title:	Date of birth:
Full names and surname:	
ID number:	
Contact number(s)	
Home:	Cell:
E-mail address:	
Home address:	
Postal code:	

SECTION D: Documents to be submitted with the application

Attached

- | | |
|--|--|
| 1. Bank statement of beneficiary (not older than three months) | <input type="radio"/> Yes <input type="radio"/> No |
| 2. Original certified copy of the Identity Document or Smart ID card (include both sides) of beneficiary | <input type="radio"/> Yes <input type="radio"/> No |
-

Signature of guardian

Date

Signature of applicant (beneficiary)

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.