

PENSION CHECK LIST FOR RETIREMENT

A. PENSION BENEFITS:

(i)

X	A pension gratuity is payable to you.
X	A gratuity and a monthly pension is payable to you. (where applicable)

B. REQUIRED DOCUMENTS:

(ii)

X	E54 / Letter of application – Your immediate supervisor's signed recommendation must also be entered on this form.
X	Affidavit – specimen signatures
X	Choice Form for Benefit Payable upon Retirement – an option must be exercised, regardless of marital status
X	Z864 – Your thumb print is compulsory. This form must be certified in the presence of a commissioner of oaths, whose official stamp must appear on this completed form
X	Choice Form for State Subsidised Medical Contribution, accompanied by a membership certificate from your medical aid and, if applicable, from your previous medical aid scheme (Complete ONLY Sections A, B & D.)
X	Z583 – Complete ONLY Sections 1 to 3.
X	Z894 – Verification of <u>your</u> bank account details by your financial institution N.B. Account numbers exceeding 11 digits will be rejected by National Treasury. <u>Provision of the following is compulsory: Clearly legible bank date stamp with branch code (any other bank stamp is not acceptable), your thumb print, signature and contact details</u>
X	Certified copy of your scannable bar-coded identity document
X	Certified copy/copies of your marriage certificate(s) and, if applicable, ante-nuptial contract(s) OR divorce decree(s) and terms of settlement(s)
X	Documentary proof from the South African Revenue Service (SARS) of your income tax reference number
X	BAS Entity Maintenance form – Verification of <u>your</u> banking details by your financial institution
X	Confirmation from your bank regarding the balance of your state guarantee (<u>not your housing loan balance</u>)
X	WP1002 – Beneficiary Form

NOTE:

INSTRUCTIONS FOR COMPLETING PENSION APPLICATION FORM

- All application forms and attachments (i.e. certified copies of documents) submitted must be of good quality and not older than 6 months.
- Texts must be legible and photographs clear. If documents are of a poor quality, new forms and/or attachments must be obtained and completed. Documents of a poor quality will result in errors and will delay the processing of your application.
- All documents which accompany an application must be stapled to the application form.
- No alteration may be on the application form or on any of the accompanying documents as these will render the form or document invalid. “TIPPEX” may not be used to alter forms or documents.
- One character must appear in each of the blocks that make up the field. Use **CAPITAL LETTERS** and a **black ink** pen. Each letter must be written within the boundaries of each block. Leave a block open between surname and first name(s), and also between first names.

For example: VAN WYK, ANNA MARIE LORRAINE

V	A	N		W	Y	K		A	N	N	A		M	A	R	I	E		L
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- Complete the date field as follows:
Century character 1, century character 2, year character 1, year character 2, month character 1, month character 2, day character 1 and day character 2 (CCYYMMDD)
Where the month and/or day consist of one digit only, zeros must be placed in front of the number.

For example:

C	C	Y	Y	M	M	D	D
2	0	0	8	0	5	0	1