



**FOR OFFICE USE**

Application no.

**Taxpayer Details**

Taxpayer ref no.  Year of Assessment ended on (CCYYMMDD)

Surname

First Name

Other Name

Initials  Date of Birth (CCYYMMDD)  ID No.

Other Identification  Specify other identification

If the taxpayer/member is not registered for income tax, select one of the following reasons: Unemployed  Other  If other, Specify

Annual income R  Employee no.

Is the taxpayer a non-resident? Yes  No

**Residential Address**

Postal Code

**Postal Address**

Postal Code

**Particulars of Fund**

Registered Name of Fund																														
Contact Person																														
Email address of Administrator																														
Tel No.							Membership No.							Fund Approval No. (Applicable to Public Sector Funds)	1 8 2 0 4															
Fund PAYE Reference No.	7						FSB Registration No.	1 2 / 8 /																						
Participating Employer Name																														
Type of fund	Pension	<input type="checkbox"/>	Provident	<input type="checkbox"/>	Pension Preservation	<input type="checkbox"/>	Provident Preservation	<input type="checkbox"/>																						

**Postal Address**

																								Postal Code						
Indicate whether this fund is	A public sector fund	<input type="checkbox"/>	An approved fund	<input type="checkbox"/>	Other, specify	<input type="checkbox"/>	If other, Specify																							

**Particulars of Gross Lump Sum Due**

Reason for directive:	Transfer	<input type="checkbox"/>	Divorce - Transfer	<input type="checkbox"/>	Divorce - Member Spouse	<input type="checkbox"/>	Divorce - Non-Member Spouse	<input type="checkbox"/>	Par (eA) Transfer/Payment	<input type="checkbox"/>	Security of Mortgage Bond Order / Housing Loan	<input type="checkbox"/>													
	Resignation	<input type="checkbox"/>	Future Surplus	<input type="checkbox"/>	Unclaimed Benefit	<input type="checkbox"/>	Withdrawal	<input type="checkbox"/>	Termination of Employment (Retrenchment)	<input type="checkbox"/>															
Gross amount of lump sum payment	R											,													
Date of accrual (CCYYMMDD)																									
Date on which membership commenced (CCYYMMDD)																									
Date of divorce order (CCYYMMDD)																									
If a public sector fund, the period, if any, during which the member was a member of another public sector fund																									
Date From (CCYYMMDD)					Date To (CCYYMMDD)					=			Completed years												
Period of employment taken into account in terms of the rules of the fund:(only applicable to Public Sector funds)																									
Date From (CCYYMMDD)					Date To (CCYYMMDD)					=			Completed years												
In the case of a Provident fund, total contributions up to 1 March 2016 (excluding profit and interest) by member to the fund																									
R																							,		
Transfer by Non-member spouse previously taxed													R										,		

