

# Notification of Retirement

Wealthport (Pty) Ltd (2012/025878/07)

Wealthport (Pty) Ltd ("Wealthport") is an Authorised Financial Services Provider (FSP No. 44158)  
Ballyoaks Office Park, 35 Ballyclare Drive, Bryanston Johannesburg • Postal address: Postnet Suite 451, Private Bag X51,  
Bryanston, 2021

Contact number: 010 593 3103 • Facsimile: 087 231 6972 • Email: [admin@wealthport.co.za](mailto:admin@wealthport.co.za)



## Important Information:

- Please read the latest Terms and Conditions applicable to this investment. This is available from your Financial Advisor, the Client Services Centre at 010 593 3103 or at [www.wealthport.co.za](http://www.wealthport.co.za)
- Please submit applications for processing to [admin@wealthport.co.za](mailto:admin@wealthport.co.za) or fax to 087 231 6972.

Please select the Retirement Fund of which you are a Member and would like to retire from:

Retirement Fund Name	FSB Registration Number
Wealthport Retirement Annuity Fund	38096
Wealthport Pension Preservation Fund	38092
Wealthport Provident Preservation Fund	38097

## 1. Member details

First name:

Surname:

ID number:

Email address:

Cell phone number:

Portfolio number:

Portfolio name:

Retirement date:  Y Y Y Y /  M M /  D D Age:

Estimated income:\* R

\* Annual income for the current tax year required for tax purposes.

## 2. Member Bank Account details for withdrawal payment

Please attach a cancelled cheque or recent bank statement for the bank account specified, as proof of banking details.

Bank:

Branch:

Branch code:

Account holder:

Account number:

Account type:  Current  Savings  Transmission

All cash portion payments are made electronically to the bank account of the Member only.

Payments to third party bank accounts are not permitted.

## 3. Early retirement request

Is this a request for early retirement due to permanent disability or ill health?  Yes  No

If "Yes", please refer to the additional supporting documents required in this instance.

A Member may only request an early retirement benefit (i.e. before the Member has reached the normal retirement age of 55) due to permanent disablement. The Member may make such a request when the Member is permanently disabled due to injury or illness, which in the opinion of the Trustees of the fund and based on medical evidence, renders the Member



## 7. Member declaration

- I have read, understand and agree to the latest Terms and Conditions AND latest Conditions of Membership governing this agreement, as published on the Wealthport website.
- I confirm that all information provided herein is true and correct and I will advise Wealthport in writing should any of the details change subsequent to signature hereof.
- I confirm that Wealthport may accept all instructions signed by me, including instructions submitted via electronic means.
- I confirm that the Financial Advisor signature below is that of my appointed Financial Advisor.
- I instruct and authorise Wealthport and the Fund (where applicable) to pay all the monies due in accordance with the instructions herein, subject to the rules of the Fund (where applicable).
- I understand that the administrator must apply for a tax directive in the name of the Member and any tax due will be deducted from the amount payable/transferrable. I understand that the payment/transfer will be delayed until a successful tax directive has been received.
- I understand that this application will only be finalised once Wealthport has received and verified all required documentation.

Member signature:

Date:

Y	Y	Y	Y	/	M	M	/	D	D
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Financial Advisor  
signature:

Date:

Y	Y	Y	Y	/	M	M	/	D	D
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## 8. Supporting Documents Required

- Early retirement due to ill-health:
- Doctor's report confirming disability
  - Medical certificate completed by the medical doctor who is currently treating or has treated the Member
  - Declaration by employer to consider the disability claim.
  - A copy of the accident report if the disability has been caused by an accident
  - Power of attorney from curator if applicable
  - List of Members' income and expenses
- The Trustees will review the evidence provided in order to determine whether the Member is entitled to an early retirement benefit as a result of permanent disability due to ill health or injury.
- Transfer to a Living Annuity: Copy of Living Annuity application form, completed and signed by the Member.