

Death claim

Retirement Funds

Request for information in respect of minor child



The Nedgroup Investments Retirement Annuity, Pension and Provident Preservation Funds (the Fund/s) are administered by FNZ SA Financial Administration Solutions (Pty) Ltd (the Administrator). In this document references to “we”; “us”; “our” are references to the Fund and/or the Administrator.

1. What you need to know

1. We require the information requested in this form to process our investigation. Please complete and return to us together with the required supporting documentation at NedgroupInvestmentsPP@silica.net.
2. The legal process in terms of Section 37C of the Pension Funds Act requires the Trustees of the Fund/s to gather information to identify the people who were dependent on the deceased for their maintenance in order to distribute the death benefit. For more information about the process please visit www.nedgroupinvestments.com.
3. During the investigation information is collated about the deceased’s family circle and any other persons nominated by them or mentioned in their Will or a trust established by them. We contact these people to collect and corroborate information and demonstrate that a search was done for dependants as the law requires. The information is collected and processed only for purposes of the investigation.
4. If you have any questions about this form, please contact Nedgroup Investments Client Services Centre on **0800 123 263** (from within SA) or on **+27 21 412 2003** (from outside SA).

2. Details of deceased

Title and surname

First names

3. Minor child’s personal details

Title and surname

First names

ID number / Passport number

Date of birth

Grade at school

What is the child’s relationship to the deceased?

☐

Biological / Adoptive child

☐

Other

If ‘Other’, please explain the relationship and why did the deceased provide support?

4. Minor child's benefits

List any other benefits that the minor child may receive/have received due to death of the deceased (e.g. inheritance, beneficiary of a policy payment, beneficiary of a trust).

Description	Amount
	R
	R
	R
	R
	R
	R

5. Details of minor child's dependency on deceased

How did the deceased support the minor?
(e.g. food, accommodation, payment of education/ medical expenses)

How often was the support received?

☐ Weekly

☐ Monthly

☐ Quarterly

☐ Annually

☐ Other

If 'Other', please explain

What was the value of the support received? R

Until when do you think the minor child will need financial support?

M M Y Y Y Y

What do you expect the value of the minor child's future support to be? R

What will the support be used for?
(e.g. food, accommodation, education)

List current expenses for the minor	
Accommodation (including meals)	R
Transport costs	R
School fees / Cost of tuition	R
School wear, stationary, etc.	R
Medical expenses	R
Other (please specify):	
	R
	R
	R
	R
Total monthly expenses	R

6. Details of person completing this form

Title and surname

First names

ID number / Passport number

Do you receive a grant (SASSA) for the child?

☐

Yes

☐

No

If 'Yes', value?

R

7. Capacity of person completing this form

In which capacity are you completing this form?

☐

Parent (natural guardian)

☐

Legal guardian (appointed by a court or in a Will)

☐

Caregiver

If 'Legal guardian', please explain how you were appointed/obtained appointment

If 'Caregiver', please explain why the child is not in the care of their parent (natural guardian) or an appointed legal guardian.

8. Additional comments

Please provide any information regarding family circumstances or other factors, which you think the Trustees should know of and which will help them to distribute the benefit fairly.

9. Protection of Personal Information Act

The Funds have a legal obligation in terms of section 37C of the Pension Funds Act, 1956, to conduct a full and thorough investigation to identify and determine the dependants and nominees of the deceased member of the Funds to distribute the death benefit payable as a result of the death of the deceased member ('the Purpose'). The Funds are required to obtain certain personal information, as defined in the Protection of Personal Information Act of 2013 ('POPIA') and any other relevant data protection legislation, for the Purpose.

In line with the legal obligation of the Funds, certain information will be requested from you. By providing that or any other information, you consent to the Funds, the Administrator and Nedgroup Investments (Pty) Ltd (the Sponsor):

- Processing your personal information, and the personal information of any minor(s) of whom you are the natural or legal guardian, for the above Purpose and any related purposes
- Sharing such personal information with other retirement funds of which the deceased was a member for such retirement funds to conduct their own investigation to identify and determine the dependants
- Sharing such personal information with any third party or third-party service providers for the Purpose described above, and for the purpose of storing and maintaining your personal information

In addition to the information obtained from you directly, the Funds, the Administrator and the Sponsor may collect certain information regarding you from third parties, where this is necessary for the Purpose.

After completion of the investigation, the Trustees will make a decision as to the distribution of the death benefit and this decision, and the relevant basis for the decision, will be communicated to all nominees and dependants identified in the investigation.

The Funds, the Administrator and the Sponsor shall rely on the consent exceptions, as provided for in POPIA, to process the personal information of any other persons named or identified in this form, where this is necessary for the Purpose.

10. Supporting documents

Please note that missing information and/or documentation will delay the resolution of the death claim.

Together with the completed form, please provide a copy of:

- Identity document, birth certificate or adoption papers of minor child
- Your identity document or passport (if applicable)
- Proof or evidence of your appointment as legal guardian of minor child (if applicable)
- Affidavit confirming your status as caregiver of minor child (if applicable)
- Proof of expenses paid in respect of minor child

11. Declaration and signature

I confirm and certify that:

- The information I have completed in and submitted with this form is to the best of my knowledge true and correct
- I understand that further information may be requested, and that the information provided may be corroborated with third parties

Where the signatory is assisting the person because they cannot complete and sign the form themselves, I declare that I:

- Have completed the form for the person, whose details are set out in 'Section 6. Details of person completing this form'
- Have checked all the information with the person for correctness and truthfulness or where the person is unable to provide the information due to age, physical or mental incapacity, I have personal knowledge of the person's circumstances and affairs
- Understand that further information may be requested, and that the information provided may be corroborated with third parties
- Confirm that the information is to the best of my knowledge true and correct

Relationship to person being assisted										
Cell phone number (mandatory)	+			(0)						
Alternative contact number	+			(0)						
Email address										

Signature														
Full name						Date	D	D	M	M	Y	Y	Y	Y

Nedgroup Investments

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www.nedgroupinvestments.com