



N-e-FG Administrators (Pty) Ltd

Company Reg. No.2005/000513/07
Licensed to act as an Administrator in terms of section 13B of the Pension Funds Act(act 24 of 1956)
License number 24/425, FSP licence number 45798
General e-mail address: retirement@n-e-fg.com
14 Silver Birch Building, Chopin Street SW5 Vanderbijlpark
P. O. Box 472 PARK SOUTH 1910 Republic of South Africa
Telephone: 0861 409 409
Fax: 016 932 2851

Dear Member

In order to claim for retirement, the following requirements must be met:

1. The retirement claim form must be completed correctly and all the required fields **MUST** be completed.
2. Company stamp on the last page of the retirement form is essential.
3. Certified copy of ID.
4. Certified letter from the company stating that the member has retired, with the retirement date clearly stated.
5. Copy of bank stamped statement - NOT OLDER THAN 3 MONTHS and NO INTERNET STATEMENTS.
6. Certified proof of address - NOT OLDER THAN 3 MONTHS.
7. Proof of members SARS Tax Number - if the member doesn't have a tax number a certified letter from the member can accompany the withdraw form.
8. If the money must be transferred to an annuity, please ensure that the necessary annuity form has been completed and sent with the above requirements.

All the above paperwork must be in place before any exits or claims can be processed, under NO circumstances will money be paid out to anyone if the requirements are not met, due to FSB requirements on 13B Administrators.

Process of the retirement claim will work as follows:

- Claim will be sent for approval to financial department, where a processing date will follow.
- On the processing date the fund credit will be disinvested.
- For annuity transfers, a Recognition Of Transfer will be requested from the new fund, which must be completed before payment can be made.
- The claim will then be sent to SARS (**please note** SARS can take 4-7 working days)
- After feedback from SARS has been received, the claim can then be sent for payment if there are no problems beyond N-e-FG's control.

If you need any help or have questions don't hesitate to phone us.