

# Sanlam Beneficiary Fund

## Application for fund closure by major

**Note:**

- The beneficiary has to complete this application.
- The completed form and supporting documents must be sent to: [lbf@sanlam.co.za](mailto:lbf@sanlam.co.za)

### Please indicate instruction type:

☐ Take full benefit in cash

☐ Remain invested with a monthly income (if applicable, please specify the income amount): R

Do you need any investment advice?

☐ Yes

☐ No

☐ Take part benefit in cash- specify the amount: R

(remaining amount invested in the fund, please specify income amount): R

### SECTION A: Personal particulars of applicant (beneficiary)

Title:

Date of birth:

Full names and surname:

ID number:

Contact number(s)

Home:

Cell:

E-mail address:

Home address:

Postal code:

Please indicate your current occupation:

☐ Studying

☐ Working

☐ Unemployed

### SECTION B: Banking details of beneficiary

Name of bank:

Branch code:

Account number:

Account type:

## SECTION C: Personal particulars of guardian

Title:	Date of birth:
Full names and surname:	
ID number:	
Contact number(s)	
Home:	Cell:
E-mail address:	
Home address:	
Postal code:	

## SECTION D: Documents to be submitted with the application

### Attached

- |  |  |
|--|--|
| 1. Bank statement of beneficiary (not older than three months)   | <input type="radio"/> Yes <input type="radio"/> No |
| 2. Original certified copy of the Identity Document or Smart ID card (include both sides) of beneficiary | <input type="radio"/> Yes <input type="radio"/> No |

Signature of guardian

Date

Signature of applicant (beneficiary)

Date

### Disclaimer

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx>; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: [SCClientCare@sanlam.co.za](mailto:SCClientCare@sanlam.co.za) or call: 086 122 3646.