

BENEFICIARY NOMINATION

- To be completed if you are a member of the Multilect Managed Annuity Fund and the Multilect Living Annuity – Guardrisk Life annuity.
- Nomination of a beneficiary will not be accepted if no ID number has been provided.
- If no beneficiary is nominated, the proceeds may be payable to your estate.
- Any benefits due on death will be dealt with according to any applicable laws governing the payment of such benefits.
- The beneficiary nominations contained in this application form supersede any other beneficiary nominations contained in the investor's will.
- The signature of the investor's spouse is required if the investor is married in community of property and nominates a beneficiary other than the investor's spouse.
- An investor may nominate alternate beneficiary/ies if the primary beneficiary/ies have predeceased the investor,

Name of fund: _____

Full names of Member: _____

Membership number/s: _____

Primary Beneficiary 1:

Full names: _____

ID number: _____ Relationship: _____

Share %: _____ Email: _____

Address: _____ Code: _____

Tel (h): _____ (w): _____ Cell: _____

Details of Legal Guardian if the dependant is a minor child: _____

Primary Beneficiary 2:

Full names: _____

ID number: _____ Relationship: _____

Share %: _____ Email: _____

Address: _____ Code: _____

Tel (h): _____ (w): _____ Cell: _____

Details of Legal Guardian if the dependant is a minor child: _____

Alternate Beneficiary 1:

Full names: _____

ID number: _____ Relationship: _____

Share %: _____ Email: _____

Address: _____ Code: _____

Tel (h): _____ (w): _____ Cell: _____

Details of Legal Guardian if the dependant is a minor child: _____

Alternate Beneficiary 2:

Full names: _____

ID number: _____ Relationship: _____

Share %: _____ Email: _____

Address: _____ Code: _____

Tel (h): _____ (w): _____ Cell: _____

Alternate 3:

Full names: _____

ID number: _____ Relationship: _____

Share %: _____ Email: _____

Address: _____ Code: _____

Tel (h): _____ (w): _____ Cell: _____

Processing of Personal Information in terms of the Protection of Personal Information Act 4 of 2013

Your privacy is of utmost importance to us. We will take the necessary measures to ensure that any and all information, including personal information (as defined in the Protection of Personal Information Act 4 of 2013) provided by you or which is collected from you is processed in accordance with the provisions of the Protection of Personal Information Act 4 of 2013 and further, is stored in a safe and secure manner and kept for the period prescribed by the applicable laws.

You hereby agree to give honest, accurate and up-to-date personal information which may be used for the following reasons:

- to establish and verify your identity in terms of the applicable laws;
- to enable us to fulfil our obligations in terms of this transaction;
- to enable us to take the necessary measures to prevent any suspicious or fraudulent activity in terms of the applicable laws; and

- reporting to the relevant regulatory authority/body, in terms of the applicable laws.

We may share your information for further processing with the following third parties, which third parties have an obligation to keep your personal information secure and confidential:

- Payment processing service providers,
- merchants, banks and other persons that assist with the processing of any benefit payable;
- Law enforcement and fraud prevention agencies and other persons tasked with the prevention and prosecution of crime;
- Regulatory authorities, industry ombudsmen, governmental departments, local and international tax authorities, and other persons that we, in accordance with the applicable laws, are required to share your Personal Information with; and
- Credit Bureau's.

You acknowledge that any personal information supplied to us in terms of this transaction is provided according to the applicable laws. Unless consented to by yourself, we will not sell, exchange, transfer, rent or otherwise make available your personal information to any other parties and you indemnify us from any claims resulting from disclosures made with your consent. Such personal information provided (voluntarily, unconditionally and specifically) will be utilised by us or by any appointed third parties, on our behalf, and will be kept for such period as legislated according to the applicable laws.

You understand that if we have utilised your personal information contrary to the applicable laws, you have the right to lodge a complaint with Multilect within 10 (ten) days. Should Multilect not resolve the complaint to your satisfaction, you have the right to escalate the complaint to the Information Regulator.

Signed at _____ **this** _____ **day of** _____ **20**_____

Member name and signature: _____

Spouse name and signature: _____
