



National Fund for Municipal Workers Member Benefit Investment Instruction

Where this form is used in conjunction with Form A020 – 'Divorce Agreement – Claim Form', the reference to 'Member' on this form A005 will mean the applicant (with details as specified on Form A020) claiming the divorce benefit.

MEMBER INFORMATION

Surname	<input style="width: 100%;" type="text"/>								
Full names	<input style="width: 100%;" type="text"/>								
ID number <small>ATTACH COPY OF ID DOCUMENT</small>	<input style="width: 100%;" type="text"/>								
Income tax number	<input style="width: 100%;" type="text"/>								
Exit date	<table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width: 12.5%;">D</td><td style="width: 12.5%;">D</td><td style="width: 12.5%;">M</td><td style="width: 12.5%;">M</td><td style="width: 12.5%;">Y</td><td style="width: 12.5%;">Y</td><td style="width: 12.5%;">Y</td><td style="width: 12.5%;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		

ADVISER INFORMATION

Name and surname	<input style="width: 100%;" type="text"/>
Telephone number	<input style="width: 100%;" type="text"/>

DISTRIBUTION OF BENEFITS		Category <input type="checkbox"/> A <input type="checkbox"/> E	Category <input type="checkbox"/> C
	Membership No.		
1	Cash to Member	R -	R -
2	Transfer to non-approved fund (Discretionary investment)	a. Amount	R -
		b. Registered fund name	FUND NAME
		c. Fund/Policy no.	FUND / POLICY No.
3	Transfer to approved fund	a. Amount	R -
		b. Fund/Product Name	FUND NAME
		c. FSB Fund/Policy no.	FUND / POLICY No.
TOTAL		R -	R -

Does the member have an outstanding *pension backed* home loan? If 'Yes', what is the outstanding amount?

YES NO
 R
See note (iii) below.

- Notes:**
- (i) Member must please co-sign the adviser's instruction as to the way the payment is structured and a copy of the signed instruction must be attached hereto.
 - (ii) Amounts taken in cash might be taxable. (See SARS tax tables)
 - (iii) Should an outstanding home loan be settled, due consideration should be given to the tax implication thereof, as the settlement amount will be deemed a cash withdrawal and therefore be taxed. Should the member elect a portion of the benefit in cash, the outstanding home loan amount will be added to the cash portion amount when applying for a tax directive from SARS.
 - (iv) Copies of Fund/Policy application document to be attached.

Signature: Member

D	D	M	M	Y	Y	Y	Y
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Signature: Adviser

D	D	M	M	Y	Y	Y	Y
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National Fund for Municipal Workers CONTACT DETAILS
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