

Forms to be completed when a member exits service

Questions & Answers

When a member has passed away, what exactly do I need to do?

- Complete and submit the Death Notification form. This will allow Robson Savage to amend the member's administration record accordingly and initiate any insurance claim procedures, if applicable, without delay.
- Thereafter it will be necessary for a benefit distribution investigation to be carried out as necessitated by the Pension Funds Act. Please liaise with your fund administrator and consultant to ensure that the correct procedures are followed.

Can the forms be customised to be specific for my company/fund?

- We have deliberately moved away from a situation where different funds have different forms in order to keep things as simple as possible and to reduce the risk of an adverse effect on service levels. If the forms need to be amended, for example, a simple structure makes it much easier to implement any such changes.

What will happen to benefit forms recently submitted in a previous format?

- Rest assured we will process and pay any cases already submitted and this will not hold up the payment process in any way.

What if it is not possible for the member to sign the form?

- Our strong preference is for the member to sign the form in all cases. If this is not possible then a company official needs to take responsibility for the details on the form.

Can I scan and submit forms as attachments to an email?

- Yes this is perfectly acceptable.

Do I have to submit an original form after I have emailed it?

- No this will not be necessary. We do, however, recommend that the original form be kept at your offices on the employee's file.

Why is there a separate form for withdrawals compared to retirements?

- The options available in terms of the fund's rules are different and having separate forms avoids unnecessary complexity and makes it easier to complete.

What if the member has a divorce order against their benefit?

- You will see that there is space on the form for this, or any other claim against the benefit, to be disclosed.

What if I need assistance or have a question regarding using the forms?

- Please contact the fund's administrator at Robson Savage, they will be only too happy to assist.