
WEB-BASED DEATH BENEFIT BENEFICIARY NOMINATION FORMS

Have you ever wondered if your death benefit beneficiary nomination form is up to date, or where it is?

Now you can manage this yourself online at www.robsav.com

WHAT IS THIS ABOUT?

In the event that you die whilst a member of a pension, provident, retirement annuity or preservation fund, the trustees must distribute your death benefit to your dependants or nominees in accordance with the Pension Funds Act.

The trustees will be guided by your wishes contained on this form to ensure that:

- the right beneficiaries are paid, and
- your death benefit is paid without unnecessary delay

So, it really is in the interests of your dependants and/or nominees that you have an up-to-date form that is easily accessible to the trustees in the event of your death.

BUT I HAVE ALREADY COMPLETED ONE PREVIOUSLY?

If you have previously completed a beneficiary nomination form which is retained by your employer, then you need not do anything. This online facility is intended to complement the current process and ensure a quick and easy way to keep this updated.

You can, of course, continue with the paper version. The trustees will be guided by your most recently dated form.

A key benefit of the online facility is that it ensures the fund has your updated beneficiary nomination form which will form part of your member records at Robson Savage.

HERE'S HOW YOU DO IT!

- Go to www.robsav.com
- Login under the “Member” tab
- If you are a member of more than 1 fund administered by Robson Savage select the fund you wish to view
- Navigate to the “Member Documents” tab
- Click on the “Online Beneficiary Nomination Form”
- Complete it on the screen
- You may print it by clicking on the print icon, **then** hit “Submit”
- You will receive a “pop-up message” confirming if your submission has been successful
- Your form will be automatically signed and dated by our systems, and will appear under your “Member documents” tab shortly thereafter
- Only you will be able to view or change the form, by logging in using your personal details and password

Remember, as a member of a fund administered by Robson Savage, you are able to view your fund credit, its investment performance, past benefit statements, various calculators and other useful information online at www.robsav.com

Visit us at www.robsav.com