

Request for a Tax Deduction Directive Pension and Provident Funds on Retirement/Death before Retirement

FOR OFFICE USE

Application no.						

Taxpayer reference no. Year of Assessment ended on (CCYYMMDD) Image: Comparison of the sessment ended on (CCYYMMDD) Surname Image: Comparison of the sessment ended on (CCYYMMDD) Image: Comparison of the sessment ended on (CCYYMMDD) Name(s) Image: Comparison of the sessment ended on (CCYYMMDD) Image: Comparison of the sessment ended on (CCYYMMDD)	
Name(s)	
Initials Date of Birth (CCYYMMDD) Identity number Identity number	
Passport/ Permit no. Passport Country / Country of Origin (e.g. South Africa = ZAF)	
If the taxpayer/member is not registered for income tax, select one of the following reasons: Unemployed Other Specify other I	
Annual income R Benployee number B	
Is the taxpayer a non-resident? Yes No Is the certificate of residency (citizenship certificate only where DTA is not applicable) attached? Yes No	
Residential Address	
Postal Address	
Particulars of Fund	
Registered Name of Fund	
Contact Person Image: Ima	
E-mail address	
	1 8 2 0 4
PAYE Reference no. 7 FSCA Registration no. 1 2 / 8 / 0 0	

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Particulars of Fund (continued)	
Participating Employer Name	
Type of fund: Pension Provident Pension Preservation	
Postal Address	
	Postal Code
Indicate whether this fund is: A public sector fund An approved fund Other Specify other	
Particulars of Gross Lump Sum Due	
Reason for directive: Retirement Retirement due to ill-health Death before Retirement Provident Fund Deemed Retirement Transfer before	before Retirement [Par 2(1)(c)]
Date of accrual (CCYYMMDD) Date on which the member became a member of the fund (CCYYMMDD)	
Gross amount of lump sum payment (Including the amount deemed to accrue in respect of par 2B of the Second Schedule)	
Gross amount of total benefit R	
Amount attributed to a non-member's spouse in respect of divorce order	
In case of a provident fund, total contributions by member to the fund up to 1 March 2016 (excluding interest and profit)	
In case of a provident fund, total contributions to the fund after 1 March 2016 (excluding interest and profit)	
Transfer from Pension Fund (after tax amount)	
Directive number for pension transfer	, <u></u> , <u></u>
If a policy of insurance is ceded to the member, state the surrender value as at date of cession (for the purpose of paragraph 4(2)bis of the Second Schedule) R	
Where member contributions to the fund have exceeded such amounts as allowed for deduction against income, state total amount of excess contributions.	
Former AIPF member's contributions transferred to the fund	
Transfer by non-member spouse previously taxed	
Was a period consisting of a number of completed years used to determine the quantum of the benefit in terms of a formula prescribed in terms of the rules of the fund? Yes No	
If "YES", state the period of employment taken into account in terms of the rules of the fund:	
Date From (CCYYMMDD) Date To (CCYYMMDD) = Completed years	
If "NO", state the period of membership of this fund during which contributions were made:	
Date From (CCYYMMDD) Date To (CCYYMMDD) = Completed years	

Particulars of Gross Lump Sum Due (continued)	
Was there a partial withdrawal taken from this benefit in the previous or current fund prior to this payment? Yes No	
If "YES", state the particulars below:	
Date of partial withdrawal (CCYYMMDD)	Amount of partial withdrawal R
Directive number	
Date of partial withdrawal (CCYYMMDD)	Amount of partial withdrawal R
Directive number	

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Did the fund trar	nsfer	the re	tiremen	t bene	fit to a	anothe	r fund	d befor	re reti	iremei	nt?	Yes		No								Tra	Insfer	ee fur	d type	: (Retire	ement	Annui	ty Fur	nd		F	Pensio	n Pres	servati	ion Fu	nd	Pro	oviden	t Pres	ervatio	n Fun	d
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Taxpayer reference no.																																												

FORM A&D

Pension/Annuity Pu	rchase	Detai	s (cor	ntinue	ed)																													
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pension / annuity was purchased																																		
E-mail address of insurer																																		
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Surname																																		
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Taxpayer reference no.																																				
State if the transfer / purchase	of the an	nuities i	is subje	ct to s	pecia	I condi	tions. (Confirm	the a	oplicab	le pro	vision i	n the	fund r	ules.												 		 					 		
Is the fund paying the annuity?	Ye	s	No											If ves	state	e the a	mount	remaini	ina in	the fu	nd to r	bay the	annuiti	v		R						$\overline{}$	$\overline{}$			
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Were any services rendered in	side / out	side th	e Repu	blic du	ring t	the per	od of r	nembei	ship c	of the fu	und?	Ye	s	No	0																					
Total number of months servic	es were r	endered	d while	contrib	outing	g to fun	d																													
Total number of months servic	es were r	endered	d inside	the Re	epubl	lic whil	e contr	ibuting	to fun	ł																										
Total number of months servic	es were r	endered	d outsic	le the F	Repu	blic wh	ile con	tributing	j to fu	nd																										
Period of Empl	oyme	ent i	n Pı	ublic	: Se	ecto	r Fu	nd (exc	ludi	ng .	AIPF	-)																							
Date From (CCYYMMDD)							Da	ate To (ССҮҮ	'MMD[D)							=	-		Con	npleted	years													
The original amount attributed	to the ab	ove peri	iod of n	nembei	rship	in the	public	sector f	und (fi	ull ben	efit)	R													, [
Date the amount was transferred public sector fund (CCYYMMD	ed from D)														P	ublic S	ector fu	ind dire	ective	e numbe	er for t	the origi	nal tra	nsfer												
Date of transfer from first appre	oved fund	(CCYY	'MMDD))																																
Was the benefit received direct	tly from a	Public S	Sector	Fund?					Yes		No																									
Did the previous Fund indicate	the bene	it was f	rom a F	Public	Secto	or Fund	?		Yes		No																									

Details of Salary Earned (only applicable for date of accruals prior to 1 October 2007) Highest average salary earned by the taxpayer during any 5 consecutive years in the service of the employer during his membership of the fund: Date From (CCYYMMDD) Date To (CCYYMMDD) Salary R Date From (CCYYMMDD) Date To (CCYYMMDD) Salary R

Date From (CCYYMMDD)		Date To (CCYYMMDD)	Salary	R							
Date From (CCYYMMDD)		Date To (CCYYMMDD)	Salary	R							Τ
Date From (CCYYMMDD)		Date To (CCYYMMDD)	Salary	R							
			Total	R							
			Average for 5 years or lesser period if employee employed for lesser period	R							Τ
			On death: The member's salary during 12 months immediately preceding dea	ath R							
Note: Salary includes any	amount received or receivable annually under a	contract of service including cos	of living allowances, commission, shares of profits, etc., but not occasional bonus	es or f	ees which	vere dep	endent on th	ne whim o	f directo	rs or employ	yer.
Particulars of	Employer (only applicable	e for date of accrua	ls prior to 1 October 2007)								

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Name of Employer																										
PAYE ref no.																										
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