

## EasyEquities Retirement annuity Fund Cash Withdrawal Form

As a member of the Retirement annuity fund, you may make a cash withdrawal, of 100% per investment account, before retirement if your

investment account is less than R15,000.00 on the date that your benefit is paid.

The withdrawal amount you will receive is the market value of your investment accounts, less fees, charges and any tax due to SARS

### Instructions

1. Please send the completed Cash Withdrawal Form to the administrator at [ra@easyequities.co.za](mailto:ra@easyequities.co.za)
2. Attach a copy of your bank detail/copy of your ID/proof of SARS registration
3. Cut of time for receiving instructions is **11:00** (SA).
4. Ensure the entire EasyEquities Retirement Annuity is in cash in your EasyEquities account.

### Fund Details

Your Retirement Annuity Membership Number :

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Log onto the website [easyequities.co.za](http://easyequities.co.za) to view your membership number

### Personal Details

Title \_\_\_\_\_ Surname \_\_\_\_\_

First Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_\_

ID Number 

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 or Passport Number (if foreigner) 

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Contact no. (H) \_\_\_\_\_ Contact no. (W) \_\_\_\_\_

Cell no. \_\_\_\_\_ Fax \_\_\_\_\_

E-mail address \_\_\_\_\_

Income tax reference number 

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**Your income tax reference number is compulsory for the tax directive that we must request from SARS. Income tax reference numbers start with a 0, 1, 2 or 3 and are ten digits long.**

Annual Income (Rand amount only) 

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Has any divorce or maintenance order been made against your interest in the Fund which has not been paid to the non-member spouse?

Yes  or No

If yes, please provide the details and attach a certified copy of the court order and settlement agreement, or amended agreement if not already provided.

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### Cash Withdrawal Instructions

Please pay the full value in my EasyEquities Retirement Annuity Account to my bank account.

Note: If the value of the account is not less than R15,000.00 on the date of withdrawal this withdrawal instruction will not be implemented.

**Bank Account Details for Cash Payment**

Account holder \_\_\_\_\_

Signature of Account holder \_\_\_\_\_

Bank \_\_\_\_\_ Branch Name \_\_\_\_\_

Branch Code \_\_\_\_\_ Account number \_\_\_\_\_

Type of account  Current  Transmission  Savings

- **A cancelled cheque or bank statement must be attached as proof of banking details.**
- **The account holder must have a South African bank account.**
- **No payments will be made into third party bank accounts, home loan accounts or credit cards (in terms of Section 37A of the Pension Funds Act, we cannot transfer money from a Retirement Annuity Fund to an account number held by a third party).**

**Investor Declaration**

1. I understand that the cash lump sum requested above is a pre-tax amount and that the EasyEquities Retirement Annuity Fund ("the Fund") will have to apply for a tax directive and withdraw any tax payable from this amount before payment to me.
2. I hereby instruct and authorise the Fund to pay all the monies due in accordance with the instructions above, subject to the Rules of the Fund.
3. I the undersigned member hereby confirm that:

- The information given herein is true and correct,
- I am the account holder on the abovementioned bank account,
- I have reviewed the Fund's Terms and Conditions
- I instruct and authorise the administrator to pay all monies due in accordance with my instructions above,
- I have read, understood and agree to the relevant Terms and Conditions of Membership which I understand may have changed since my original investment.,

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

Signature of investor \_\_\_\_\_

Signature of investor's authorised representative\* (if applicable) \_\_\_\_\_  
**If signing on behalf of the investor please provide proof of authority and supporting verifying documentation.**